DEVONthink

VERSION 3.9.17

DOCUMENTATION

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GETTING STARTED

IN THIS CHAPTER

Welcome to DEVONthink, a powerful assistant in your quest to organize many kinds of information. From recipes to your dissertation, hobbies to health, for work or home, DEVONthink can help you gather, organize, and connect your data. This manual will help get you familiarized with DEVONthink's concepts, interface, and options. We begin with simple overviews, move into descriptions of the essential controls, then conclude with the deepest details in the appendix.

Note this manual is meant as a handy reference, not as a series of mandates on how you must use it. DEVONthink can be used very simply or in very complex ways and each person brings their own personal approach to using it. To that end, this document can't be an exhaustive guide to everything you could ever do with it. With the flexibility and capabilities built-in, that would be an impossible task. We hope you find this guide helpful.

> Note: Text in blue color (besides hyperlinks that might get colored in blue by your ebook reader) refers to functionality only available in higher editions. You can find a list of the editions and their features online.

Warmest Regards, The DEVONtechnologies Team

Now let's get into it...

INSTALLING, UPDATING, UNINSTALLING

INSTALLING

If you haven't already installed DEVONthink, here are the easy steps to accomplish that:

- Download an installer from the Download page.
- If your browser isn't set to open safe downloaded files, double-click the ZIP file to decompress it. You will see a disk image file.
- Double-click the disk image to open it.
- Drag and drop the application from the disk image to the `Applications` folder shortcut.
- After the application has copied, press ⌘E to eject the disk image.

> Note: Please note that macOS Services and the connection to DEVONagent work only for applications installed into the *Applications* folder, and that logout and login or a restart is suggested after

UPDATING

Updates to DEVONthink are done per the schedule set in [Settings > General > General > Check for Updates](#).

If you need to manually update the software, follow the previous installation instructions, but allow the Finder to overwrite the old version. Your database(s) will not be affected. To avoid any potential problems, do not use a third-party uninstaller utility. Just replace the current version, as directed.

UNINSTALLING

If for some reason you need to fully uninstall DEVONthink from your Mac, trash the following files and folders (~ stands for your account's home folder):

- DEVONthink
- `~/Library/Application Support/ DEVONthink 3`

- `~/Library/Application Scripts/ com.devon-technologies.think3`
- `~/Library/Preferences/com.devon- technologies.think3.*`
- All DEVONthink-specific scripts in `~/ Library/Scripts`
- All DEVONthink-specific workflows in `~/ Library/Workflows/`
- All DEVONthink-specific scripts in `~/ Library/PDF Services/`
- Uninstall the DEVONthink browser extension, following the uninstallation process for the particular browser.
- Bookmarklets from your web browser
- The reference to the global inbox folder in your Finder's sidebar
- Keychain entries containing `devoncloudy` in the name

- The DEVONthink `.mailbundle` in the `~/ Library/Mail/Bundles` directory.

Note: In troubleshooting situations, please do not uninstall the software without talking to our support team beforehand. Most issues can be resolved without uninstalling the software.

DEVONTHINK SIMPLIFIED
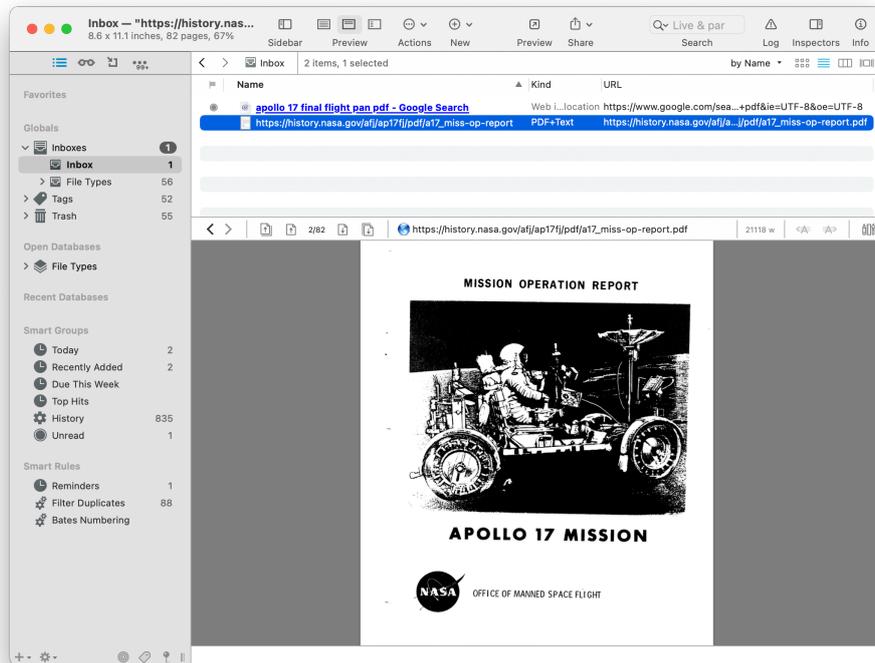
DEVONthink is a very flexible application, appealing to a broad range of people and accommodating many different working styles. Since people use it in such diverse ways, it often leads people to believe there is a "steep learning curve" associated with it. The truth of the matter is DEVONthink is a powerful application built on simple, and often familiar components and concepts. Here we'll cover the basics.

INTERFACE

At its core, DEVONthink is a multi-window, document-based application. Multi-window merely means you can have more than one window open. Document-based means it supports viewing, and in some cases editing, documents. Apple Notes is an example of a document-based application without multi-window support.

DEVONthink has two main window types: a main window (seen immediately when the software opens), and document windows. These windows are used in already familiar ways, supporting drag and drop, sorting on different attributes, full screen views, etc. Whether you are working (or playing) in DEVONthink, you will be using one or both window types.

DEVONthink supports different ways of viewing your items, e.g., in lists or as icons. You can show or hide many details in the window, allowing you to work in very simple or complex views of your data. Specifics about windows and their component panes and bars are discussed in more detail in the Windows and Inspectors chapters.

DEVONthink also has a powerful array of tools found in its menus. Many of these are also found in the context menus when Control-clicking items in the software. And to fine-tune some of the options, it also has extensive preferences.

DATABASES

Beyond the interface, DEVONthink has only a few core working components: databases and items. Items are comprised of two essential components: groups and documents.

> Note: Throughout the documentation, we use *item* to represent both groups and documents. Things that only apply to one or the other will use the appropriate term.

Displayed as ▧ and shown only in the *Navigate* sidebar, databases are the fundamental unit in DEVONthink, filled with items. No matter if your content is grouped, ungrouped, or a mix, it is all housed in a database. You add, remove, organize, and search for files within DEVONthink, just as you've done in the Finder forever. Simple.

When you create a database, it is made as a self-contained package in the Finder. Packages are technically folders that are handled like single files by the Finder.

DEVONthink databases are not merely a series of files and folders in the Finder, but are isolated from each other and function a bit more like disks. When you plug in an external drive, it appears in the Finder's sidebar isolated from other disks, but still capable of moving and organizing data on it.

In a similar fashion, open databases appear in DEVONthink's sidebar and behave in much the same way.

Global Inbox: Displayed as ▤, when you launch DEVONthink, you will immediately see a database called *Inbox*. This is a special database and a core component of the software. As a core database, you can't delete or close it, as it provides an always open database for quickly storing unfiled or transient data.

Imagine you are reading about fission reactions and someone sends a link about a vacation place in Bali. You jump to the website and quickly clip a webarchive of the page. But instead of putting it in your research database, you add it to the *Global Inbox* and get back to work. You can go back later and read or sort things to other databases. If you are familiar with Getting Things Done you'll recognize the concept.

The *Global Inbox* is also special as it is the only database you can add a shortcut to in the Finder's sidebar. This allows you to save a file into the *Global Inbox* from other applications.

All databases also have an *Inbox* group with the same purpose as the *Global Inbox*. It just allows you to save unfiled data to a more specific database, as needed.

GROUPS

One of the two basic items are groups. No different than the folders and groups found in many other applications, they merely serve as ways to keep certain bits of data together. But within the DEVONthink groups

are a few variations. They are all simple to recognize and understand, but they bear being introduced.

Ordinary Groups: Displayed as ▯, these are analogous to folders in the Finder. Except for underlying technology, groups operate in the same fashion. Creating, adding and removing contents, and deleting are all essentially the same. Just as in the Finder, you can create subgroups to suit your needs.

Looking and behaving like folders you've used in the Finder, groups are the simplest way to segregate data. DEVONthink allows you to create deeply nested hierarchies or simple top level groups, whatever you need to keep things organized in a way that makes sense to you.

New empty groups can be made with the *Data > New > Group* command. Groups of selected items can be easily made and unmade via the *Group Items* and *Ungroup Items* commands in the Data menu. These commands are also in the context menu.

Groups are also the target of DEVONthink's classify function. The AI compares document contents and locations and offers suggestions for where items may best be filed. As documents are filed, manually or taking the AI's suggestions, it becomes more and more adept at helping you file more efficiently.

Group Tags: Displayed as 🏷 , these are created and operate like ordinary groups, with one extra function: the name of a group tag is applied as a tag to its contents (sometimes referred to as "children"). By unchecking *Exclude Groups from Tagging* in a database's

properties, any group you create will function this way. For individual groups, you have the option of choosing *Exclude from Tagging* from the context menu or *Info* inspector.

As you add items to a group tag, they are automatically tagged with the parent folders' name. Similarly, removing items from a group tag will remove the parent tags. Also, if you create sub-groups, these will also be created as group tags. This can be useful if you're using a group for staging purposes, e.g., a groups for unassigned, in progress, and done items. Moving files between these groups would change the tag to its current parent group.

Smart Groups: Displayed as ⚙, smart groups should be familiar to anyone using saved searches in the Finder. Similar to them, smart groups don't actually contain anything. They merely show you items matching the criteria you specify. Sometimes broadly used in situations where deeply nested groups are not used, you can create as many as you'd like no matter your approach.

These special groups allow you to create virtual groups based on any number of matching criteria. These can be simple, e.g., "all PDF files in a database", or complex, like "all unread documents with a specific color label added in the last week but excluding HTML files". If you like to use a looser filing method, using smart groups allows you to file your items with less concern about where they're located in the database. With smart groups you can also have items appear in more than one smart group without replicating or duplicating files explicitly. For example, a smart group could show items

tagged with "taxes". You could then create another smart group with items tagged with "taxes","business", and "2018".

Local smart groups, i.e., ones applied to a specific database, can be created and edited via the *Data > New > Smart Group* command. You can also find this command in the context menu when Control-clicking in the item list. Smart groups can also be created when doing an Advanced search.

When you create a new database, DEVONthink automatically adds a few of predefined smart groups for your convenience:

- **All Images:** Shows all images.
- **All PDF Documents:** Shows all PDF documents.
- **Duplicates:** Lists all duplicates.

> Note: Smart groups filtering on dates or unread status are shown with special icons.

Smart Rules: Displayed as 🪄 and found only in the *Navigate* sidebar, smart rules are a type of smart group with an extra function: they not only match items by the criteria you specify, they can also act on them. These actions can even trigger when certain events happen. For example, you could have a smart rule matching PDFs in the *Global Inbox* and have newly added PDFs be added to the Reading List.

DOCUMENTS

The second basic item in DEVONthink are *documents*. No different than the Finder, documents are any files you add or create in your databases. Perhaps you are importing spreadsheets for work, or PDFs for your

thesis. Maybe some photos from your vacation you want to link to in a Markdown document you're working on. They're all just documents.

DEVONthink supports adding many kinds of files to your databases, but note the type of file determines its usefulness in the database. For example, images can easily be added but searching for them is limited to searching by attributes like file type or filename. Remember DEVONthink excels at text-based operations, so files like rich text or PDFs are very well supported.

> Note: More information on the types of files you can create or import can be found in the Documents chapter.

While not types of document per se, there are two variations on documents available to you: *duplicates* and *replicants*.

Duplicates: Displayed with ⧉ to the right of a document's name or the name optionally shown in blue type, there are two ways to get a duplicate in your database. Firstly, just as you'd expect in the Finder, select a file and press ⌘D: a duplicate is made. Secondly, if DEVONthink examines the contents and determines it has another file with the same content, it will mark them as duplicates. Duplicates are separate files, and changes to the content of one should remove its duplicate status.

Replicants: Displayed with ⧉ to the right of a document's name or the name optionally shown in red type, replicants are conceptually similar to aliases in the Finder or a second phone book entry for the very same person. Replicants are one file showing up in more

than one location. However, they consume no more space than a single file. Since they are clones, changes made to any instance of a document apply to all instances. This makes them useful when you want to file a document in more than one location, but don't want to have to update each document individually. It can also be useful if you have larger files you want filed in more than one group. A 10 MB PDF, replicated in ten different groups, would only use 10 MB of space in the database.

There is also the possibility of having a document that is both replicated and a duplicate. This will display this icon to the right of the name: ⬚

It's important that you understand how replicants work before you begin making changes to documents. Any changes to a replicant are carried over to all replicants; as you might imagine, this means that you can to do some very powerful (and potentially negative) things with your database's contents via replicants. Duplicates, on the other hand, allow you to change the files without modifying the original document or group. Duplicates are less powerful than replicants, but no less important in the grand scheme of database organization.

> Note: Replicants cannot be created in the same location as the originating file, nor can they be made across databases.

THE DETAILS

We hope this has given you some insight into the basics of DEVONthink. DEVONthink is deep and powerful, but understanding these basic concepts and seeing parts you are already familiar with will hopefully dispel some of the "fear" that it's complicated and hard to learn.

That being said, we also have more in-depth information for you. From simple overviews of menu commands to details in the appendix can be found in the remainder of this guide.

BUILDING YOUR DATABASE

The first step in starting your own custom database is to create a new database with *File > New Database*. Give your database an easily recognizable name, and choose where you want to save your database. We advocate putting them in a folder in your home directory, like `~/Databases`. With your new database created, you are ready to add information.

Encrypted Databases: If you have databases containing sensitive or private information, you can create an encrypted database. This is specialized AES-256 encrypted disk image that will not appear in the Finder or your desktop when it's open. In the *Navigate* sidebar, you will see a key icon to the right of the database's name, denoting it is an encrypted database. Quitting DEVONthink or closing the database unmounts the disk, so you are always required to enter the password to access it.

Choose *File > New Encrypted Database* and enter a password that will be used to unlock it. Enter a reasonable anticipated size for the database, in megabytes or gigabytes. This is how large you think the database will get. Since the encrypted database functions like a connected drive, you define how large

it is and "fill it up". You can choose to let Spotlight index the contents, but bear in mind the Spotlight index is stored locally and isn't encrypted. This means someone could find a document in the database exists via a Spotlight search. However, they wouldn't be able to open and access the database without the proper password.

> Note: You cannot create or store a database in a cloud-synced folder, e.g., iCloud Drive or Dropbox. This is not data-safe so the behavior is explicitly disallowed. The advocated location is a folder in your home directory, like `~/Databases`. If you try to open a database in one of these locations, you will be prompted to let DEVONthink move the database, or reveal it so you can manually relocate it.

ADDING YOUR FILES

After you've created your database, you'll add your files to it. Often it's a simple matter of dragging and dropping files into your database, but we've covered several additional methods in the In and Out chapter. Also, please take a moment to review the Importing & Indexing section to familiarize yourself with these two options.

While you may be tempted to dump every file on your hard drive into DEVONthink and sort it out later, you're best off being more selective in what you add (especially in the beginning). Having a large, "dump it all in" database can contain a lot of files that will do you no practical good (for example, DEVONthink can't read your Microsoft Office user profile files), and weeding these files out after-the-fact can be both time-consuming

and frustrating. Also remember, DEVONthink has to index metadata and contents of any compatible files. This will be less productive if you add files you'd never want to use or search for.

Here's a practical example: Your iTunes database runs over 22 gigabytes. There's nothing to be gained by simply copying that into a DEVONthink database. Copying the iTunes database into DEVONthink would result in a large, inefficient, and slow DEVONthink database, and would cripple DEVONthink's ability to manage and use content in a well-designed manner (much less perform simple search and organizational tasks).

As your growing databases use RAM, processor time, etc., smaller, more focused databases are often a more effective approach than using singular, monolithic databases. Separate databases generally perform better, sync faster, and in the rare case of a catastrophe, can help avoid data loss since you're not keeping "all your eggs in one basket". Another benefit of this approach is the ability to conserve some machine resources. With a single, large database all the information is always using resources, even files unrelated to what you're working on at the moment. With separate databases, you can close and open specific databases as the need dictates.

One way to effectively create separate databases is to use a topical database approach. Create multiple databases, with each holding only related information: a bird watching database full of birding articles and newsletters; a quantum physics research

database with research briefs and email. This method can improve the effectiveness of DEVONthink's artificial intelligence (AI) features with each database. The AI work best within a database that contains context relationships among many documents; clogging your new database with everything from A (apple pie recipes) to Z (Zengobi user documents) will only hamper the AI's ability to work effectively.

Having topical databases can help down the road as well. You may be collaborating on a database, syncing between machines in a group. Imagine having just one database: You decide to share your painstakingly researched academic articles with colleagues, only to find that you've mistakenly also shared personal financial records and chats. Not hard to imagine how that has the potential to be both dangerous and embarrassing. Having multiple, topical databases will allow you to keep your data separate and private.

ORGANIZING

Database organization depends on the parties involved. For collaborative work, you'll want to organize it in a manner that's understandable to all parties using it. This is especially important as our sync technology is a mirroring sync, meaning changes to one copy of the database gets synced to the other copies. For personal work, just set up your database in a manner that makes sense to you. There is no right or wrong way to organize it. This is something you've likely already been doing in the Finder, making folders and filing things in them. Apply the

same personal choices to DEVONthink. You can also use smart groups to create virtual groups.

Remember that creating databases isn't an inviolable commitment. Create and destroy them as you see fit. Start with one way of organization and decide later to re-organize your databases. With DEVONthink you can keep multiple databases open simultaneously, easily moving documents from one database to the other at any time. As you work with your databases, new ideas may spark new approaches which can easily be tried and adopted or discarded.

CASE STUDY: BILL'S DATABASE FARM

Bill DeVille, formerly DEVONtechnologies' Evangelist, worked in a number of scientific areas. Bill's main database covered environmental science and technology topics, with related interests in science and technology exchanges with developing nations. The database even contained some projects dealing with graduate education in environmental sciences and engineering. There's a broad topical relationship among these subjects and the database covers disciplines ranging from chemistry, toxicology, statistics, risk assessment, and engineering to economics, legal, regulatory, and policy issues. These disciplines fit together and combinations of these topics are necessary in many real-world cases.

As you can imagine from the above description, Bill's main database was quite large, containing about 20,000 documents and over 20,000,000 total words. Because of the relationships knitting together all

these scientific, technical, legal, and policy issues, the artificial intelligence features of DEVONthink worked very well for Bill in researching the database and contextualizing the information.

In addition to his main database, Bill had seven additional databases (so, eight total). For example, he had one database for Apple Newton literature he has accumulated over the years. It's almost as big as his main database, but the topical coverage has no practical relationship to the main database, so Bill kept the Apple Newton literature in its own domain. If he were to keep this unrelated information in his main research database, the result would be a larger, slower database, with poorer performance by the artificial intelligence.

Occasionally, Bill added topical materials to it that are not related to its main purpose. However, when those "unrelated" topics grew large enough in volume, he spun them off into to a new database in order to preserve AI accuracy and relevance.

If you'd like to follow Bill's method, start by creating a database with some collections of files that interest you, but don't be afraid to create other databases that contain "different" material as your interests, and main your database, grow. And if you need to search across databases, simply open all of them at the same time. DEVONthink searches all of them almost simultaneously.

TAGGING

Tagging is a common method of creating context relationships between documents. For example, you can apply a "hobby" tag to a woodworking article and a sewing machine PDF manual. You would then find both documents when searching for the "hobby" tag. Used in the Finder and many other applications, DEVONthink also supports tagging in your databases (including preserving Finder tags on imported and indexed items). Tags are either ordinary tags or group tags, each discussed below.
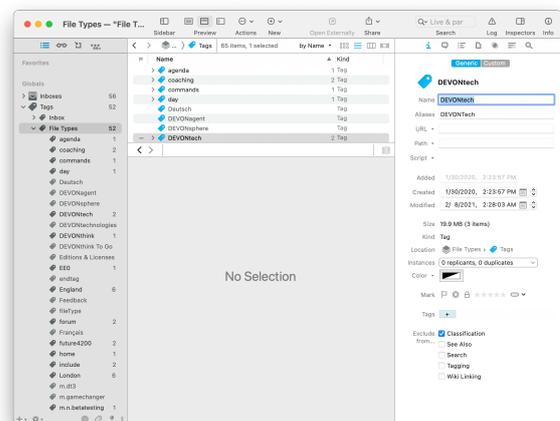
ORDINARY TAGS

Similar to tagging methods used in other applications, ordinary tags are added to items by you. Each database has its own *Tags* group and is accessed in the item list or the Tags section of the Navigate sidebar. The item count of a tag shows how many items it has been applied to. If there are unread items in a tag, the tag's name will appear in bold type. If there is a mixture of read and unread items, the count in the item list will be displayed as "unread items/total items".

Creating tags: When you add a new tag to an item, a tag group is automatically created in the *Tags* group for the database you're working in. However, you can also create tags to be used later. Create them in the database's *Tags* using the Data > New > Tag command or the *New > Tag* command in the context menu or *New* toolbar button.

Applying tags: When you apply a tag to an item, a reference to that item is created in the appropriate tag group. You will have an item reference in each tag you apply to it. So if you add three tags to a document, you will see a reference to the document in each of the three tags.

Ordinary tags are most commonly applied by these methods:

- Type tags into the Tag bar under a document's *view/edit* pane.
- Type tags into the *Tags* section of the *Info* inspector or the *Info* popover for a document.
- Drag items in your database to the desired tag in the *Tags* section. Be aware dragging an item to a tag in another database will move it to the receiving database.

> Note: While importing directly into a tag, e.g., via drag and drop, is supported, it is not generally recommended. If you do this, an item reference is made in the tag but the original item will be located in the Inbox of the receiving database. Importing then tagging is suggested.

In the case of multiple selected items, tags will only be shown in the *Info* inspector and *Info* popup if the items all have the same tags. However, you are able to tag all the selected items via the inspector, popover, or *Tag* bar.

Modifying and Merging Tags: You can rename an existing tag in the *Tags* of a database as simply as renaming any other item. The change will instantly apply to all the items using that tag. If you have similar tags but would like to consolidate them into one, e.g., having tags of `apple` and `Apple`, select them in the *Tags* group, then choose *Tools > Merge n Tags*. The tags and their item references will be merged into one tag, preserving the topmost tag's name. Again this change is applied immediately.

A tag can be dragged and dropped into another tag to create parent/child tags. But please read and understand the *Nested Tags* subsection below before proceeding.

Deleting Tags and Tag Groups: Deleting individual tags from items is done via the same methods you apply them, e.g., in the Generic Info inspector. Deleting tag groups is done in the *Tags* group of the database. Simply select the unwanted tag and choose *Data > Move to Trash*. This immediately removes the tag from all them items it was applied to. And only the item references are moved to the Trash, not the original items in the database.

Applying, modifying, or removing tags can also be done by more automated means, e.g., scripting, smart rules, and batch processing. see the Automation chapter for more information.

FINDER TAGS

Finder Tags: DEVONthink supports reading and writing macOS' Finder tags. If tags are present on an imported or indexed files, they will be preserved in the database. When tagging imported files, tags are not written to the filesystem. Instead the tags are recorded in the Spotlight metadata when the *Create Spotlight Index* option is enabled in *Database Properties* popover. This allows searching for tags in Spotlight using the `tags:myTag` syntax. If you export or drag and drop files to the Finder, macOS tags will be written to the exported file. When tagging indexed files, the tags are immediately written in the filesystem and searchable, just as they would be if you tagged them directly in the Finder.

> Note: If you would like to disable the tag exchange between DEVONthink and the Finder, click the *On* link under *DisableFinderTags* in the Hidden Preferences. Bear in mind this option inhibits importing and exporting Finder tags globally.

TAGGING SOURCES

Beyond the tag exchange with macOS, the following options in DEVONthink's *Import Preferences* or *RSS preferences* control other tagging mechanisms. The options in the Import preferences can also be manually applied via the commands in the *Data > Tags* submenu and the context menu in the item list.

RSS: In the *RSS preferences*, the *Convert categories and hashtags to tags* option converts categories detected in the feed articles or hashtags in the contents into tags.

In conjunction with the previously mentioned Finder tags or Spotlight data, this can lead to a large number of macOS tags being added automatically in the Finder.

Hashtags: Popularized in social media, hashtags are a type of tag prefixed by a #. If enabled in *Settings > Files > Import*, DEVONthink can detect hashtags in the contents of text-based files and convert them to tags for the file automatically. Removing the hashtags from the content will remove the tags from the file. Hashtags do not support spaces in them and they should be listed on a separate line. They will not be detected within existing paragraphs. Of special note, hashtags supports creating nested tags as noted here. The first tag just needs to be prefixed with the # to be detected as a hashtag..

Keywords: When enabled in the Import preferences, DEVONthink will convert the keywords of PDFs and rich text documents into tags.

Properties: Also found in the Import preferences, DEVONthink will attempt to convert certain properties to tags, e.g., the names and email addresses of the sender and recipients of emails.

Geolocation: Enable *Convert location to tags* in the Import preferences to convert the applied geolocation of a file into tags. The *Geolocation* can be viewed in the *Info* inspector.

Image Tags: The *Add tags to images* option in the Import preferences, will use machine learning to attempt to add subject matter tags to selected images. There are no user-definable controls for this option.

NESTED TAGS

Sometimes referred to as "hierarchical tags", nested tags are a series of related ordinary tags, combined under a parent tag. When you add a child tag, the item automatically inherits the parent tags. In the example shown below, adding a tag of "Casper" to an item would automatically add the "Wyoming" and "US" tags.

A special mechanism in DEVONthink allows you to create nested tags automatically: enter the tags separated by a forward slash. For example, type a tag of `software/productivity` to create a parent tag of `software` with a child tag of `productivity`. Use this option in the places where tags are entered, e.g., the *Tags bar*, *Tags* field of the *Info* inspector and *Info* popover, and the *Tags* column in the item list.

> Note: If you are having trouble deleting a tag from an item, check to see if you are adding a nested tag.

Caution: Tags for a database can have the same name. This may seem illogical, but it's something more commonly seen that you may expect. For example, say you have a travel database with points of interest like restaurants tagged in different locations. You may find yourself with a tag structure like this...

> **Example:**

```
US
    Wyoming
        Casper
            Restaurant
    Minnesota
        St. Paul
            Restaurant
```

If you added a tag `Restaurant` to an item, what tag would it go to? It actually would go to the most recently entered instance of the `Restaurant` tag.

So how is this resolved? Tags are meant to be unique, so eliminating redundant tags is first priority. Restaurants aren't specific to a geographic location. Create the `Restaurant` tag as a top level tag. If you had a need for hierarchy with the tag, perhaps for tax purposes, you could move it into a parent Tag of `Entertainment`. Then you would get both tags when you added `Restaurant`. But again, if you anticipate wanting to use the tag without the parent tag, you should make it a top level tag.

Also, you shouldn't view the tags as a group structure in and of itself. Nested tags are just meant to group tags specifically related to each other, so they can be applied en masse.

> Note: Tagging methods and philosophy is full of strong opinions. Many people feel tagging should always be flat; only top level tags and no hierarchies. DEVONthink accommodates both approaches. However, if you want to used nested tags, we hope you carefully consider the caution we've presented and use a hybrid method to avoid unexpected behavior.

GROUP TAGS

Previously discussed in the Groups section earlier in this chapter, group tags allow you to dynamically assign tags based on their location. As you add files to a group, they have tags of the parent groups' name assigned to them. Similarly, if you move the items to a new group, the tags are removed and new ones applied relative to the new location. Whether used statically or dynamically, group tags can be used creatively. They also work in conjunction with ordinary tags, so you can employ both methods in one database.

> **Example:**
>
> Imagine you have a work database with groups for different stages of a project: *Unreviewed*, *Assigned*, *In Progress*, *On Hold*, and *Done*. At the beginning of the process, you'd put the item in the *Unreviewed* group and it would be tagged as such. After reviewing, you could move the file into the *Assigned* group and the previous tag would be removed and replaced with *Assigned*. As the project moves through the staging groups, the tag would change.
>
> And of course you can use ordinary tags, e.g., *Reviewed* or a client identifier, on these items. Those tags would be preserved no matter where you move them in the databases.

Groups tags are applied by DEVONthink automatically. But you can also do some automatic filing by entering existing group tags manually. If you enter the name of an existing group that is not excluded from tagging into the *Tag* bar or an *Info* panel or popover, the item will be replicated to the appropriate group. You can also drag an item to a group tag in the *Tag Cloud* at the bottom of the *Navigate* sidebar.

Considerations: When you enable using group tags for a database, it starts as an all-or-nothing situation. All groups in the database function as group tags.

If you want to use group tags for most groups in a database, you can Control-click specific groups and choose *Exclude from Tagging*. You can also choose this option in the *Exclude from...* section of the *Info* inspector or *Info* popup for a specific group. However, note you must change this setting on all individual groups you'd like to exclude.

If you only want a limited number of tags, it would be advisable to exclude groups from tagging for the database and use ordinary tags instead.

AUTOCOMPLETION

When you are typing tags, an autocompletion list will appear. In the *Global Inbox*, tags from any open databases are shown as potential tags. In other databases, the items displayed are only from the tags of the current database.

While group tags aren't added to the *Tags* group for a database, they are displayed in autocompletion suggestions.

Tags and Aliases: DEVONthink also honors aliases added to groups. You can add "alternative names" to a group using *Info* popup or inspector and later use these alternative names as a tag. Continuing the previous example, you could add an alias of

`IP` to the `In Progress` group. Now, type `IP` as a tag and it will be replicated to the `In Progress` group. When you view the file, you will see the proper group tag was automatically added.

SEARCH AND GATHER

Finally, tags have two main functions: segregating data and searching for data. You use tags to gather items together in certain contexts. You also use tags to search for those items.

Searching for items by their tags is easily done in a few ways:

- **Tag cloud:** The *Tags Cloud* allows you to filter the current list of files by clicking on available tags. As you click, only related tags are shown so you can fine-tune the items displayed in the item list.
- **Search field:** The search field at the top of every main window allows you to search for tags by using the advanced options for a search. You can also search for tags using a simple `tags:` prefix. Multiple tags can be specified, separated by commas. You can also use `tags!:`, to exclude tags.

Gathering similarly tagged items is powerfully achieved with Smart Groups. Smart groups allow you to use the smart group editor controls to set criteria to be matched. Included and excluded tags can be added as criteria. Files matching the parameters of the smart group are shown, regardless of their location in the database. This way you can leave your files where they are and create virtual folders for specific purposes.

A WORD ABOUT BACKUPS

For many users, the value of the data is much greater than the value of the computer that hosts it. There are many things that could go wrong. Your notebook computer could be dropped, lost, or stolen. Your hard drive will fail (it's not a matter if, but when). A power outage could corrupt the files on your hard drive. For the truly paranoid (remember, paranoia is sometimes justified), how significant would the loss of your database be if your house or office were to burn down? Avoid insomnia and back up your database(s) frequently. Your data stored in DEVONthink is valuable, so back it up.

INTERNAL BACKUPS

DEVONthink backs up its database index every week, either immediately after opening the database (if the backup is overdue) or during the day when appropriate.

> Note: The internal backups are mainly a troubleshooting mechanism for use in the application. Backing up your files, including your DEVONthink databases, is up to you.

FULL BACKUPS

We strongly recommend you get in the habit of triggering backups whenever you have invested substantial time and effort into modifying the database. Apple's Time Machine and an external drive is an easy way to do this. Simply connect the drive and let Time Machine do its thing. With the low cost of portable external drives, it's even feasible to take a 1 TB drive that can fit in a shirt pocket for backups when you're out and

about. Online backups such as Arq Backup are an alternative if you don't want to own another piece of hardware to care about.

As a secondary backup option, you can create an optimized and compressed copy of the whole database that you can then save on a server or other media. Use *File > Export > Database Archive* or *Scripts > Export > Daily Backup Archive* to create a ZIP file of the database. The former option allows you to choose specific place; the latter creates it in a *Backup* folder in your home folder.

Lastly, as events such as house fires and natural disaster frequently prove, valuable data should probably be kept at more than one location. Consider saving a copy of your backed up information at a secure, off-site location such as a bank safe, or put the exported ZIP files of your database in your cloud account.

> Note: As noted in our FAQ, *sync is not a backup*, neither advertised nor advocated as such. While database restoration may be possible with sync data, it is not meant to be relied upon or used in lieu of proper primary backups.

TUTORIALS, SCREEN CASTS, AND MORE

In addition to this help resource, explore tutorials and install pre-made scripts and templates that extend DEVONthink's functionality in the Support Assistant. Also new tutorials are shown in the Extras sidebar.

For a great resource of tips, promotions, and release announcements, check out our company blog.

And if you feel like talking to other people using our applications, you'll find discussion, camaraderie, and well over a decade's worth of information at our Forums.

Take time to learn how to work with the software — and to decide how you want the software to work. You'll be rewarded with a powerful assistant for all your information organization needs.

TASKS

IN THIS CHAPTER

The number of possible uses for DEVONthink is nearly endless. In this chapter we've tried to outline a few typical use cases that show how you can use DEVONthink in your daily life and work.

ANALYZE TEXT DOCUMENTS

With its built-in artificial intelligence (AI) functions, DEVONthink can be used to analyze the documents in your databases.

The Concordance function allows you to view a list of all the words contained in a document or database. Selecting a word highlights the word in the current document. Additionally, a graph of related words is shown at the bottom of the Concordance. Right-click a word in the list or graph to exclude them. And if you're wondering about other documents containing a word, double-click one to start a search for that term.

Other functions of the AI's analyses include the Classify function. This examines the text content and locations of other documents in your database and makes suggestions for filing the current document. Additionally, See Also lists documents with a similar content to help find connections you may not have found otherwise.

Possible uses:

- Analyze the complexity and focus of a specific document collection
- Find relationships between documents or snippets quickly
- Clean up large collections of documents

Continue to read here:

- [Import documents from the file system](#)
- [Use the See Also & Classify Inspector](#)
- [Use the Concordance Inspector](#)

ARCHIVE YOUR MESSAGES

DEVONthink is the repository for emails you want to save.
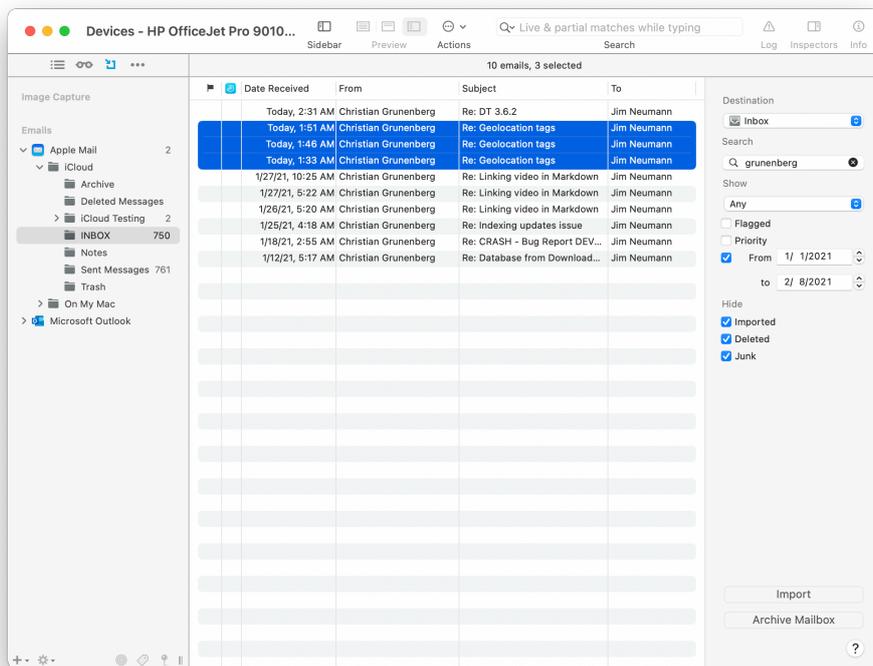
Its hierarchical groups structure, automatic classification function, and powerful search engine are perfectly suited to adding, sorting, and finding emails in your databases. DEVONthink comes with advanced email archiving functions that transfer selected messages or mailboxes from Apple Mail, Microsoft Outlook, and any email applications using standard Unix mailboxes, e.g., Thunderbird, to a DEVONthink database. The original structure of the message, as well as all attachments, are preserved when possible. You even can reply to messages directly from DEVONthink's context menu commands!
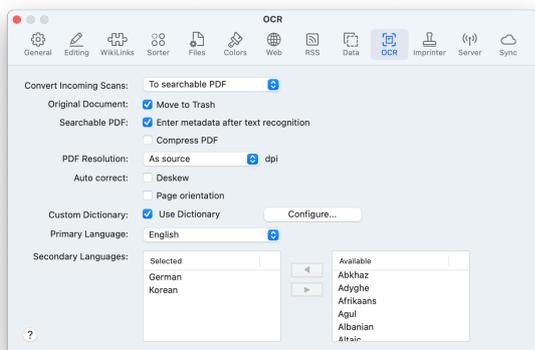
Possible uses:

- Archive important correspondence
- Archive invoices, offers, purchases, or software licenses
- Store interesting news bits from newsletters
- Keep project-related emails and other documents together

Continue to read here:

- Archive email messages
- Reply to archived emails
- Organize data using Classify and See Also

ARCHIVE PRINTED DOCUMENTS

DEVONthink is the "paperless office" solution for the Mac, a central hub for all your paper and electronic documents.

Using the integrated scanner support you can directly scan documents, make them searchable through OCR (optical character recognition),and file them in a database. Of course, you can also make existing scanned documents searchable. If you own a Fujitsu ScanSnap or other compatible document scanner, you can use the fast auto-feeder to scan batches of sheets in one go.

When you are working in a team, use the embedded web server to give your colleagues access to your data using an interactive web interface. Even friends using Windows are invited.

Possible uses:

- Archive your important correspondence
- Archive invoices, offers, purchases, or software licenses
- Store printed documents together with electronic documents
- Keep project-related emails and other documents together
- Keep a central repository for all team members

Continue to read here:

- Scan paper documents
- Scan with the Fujitsu ScanSnap
- Import existing files with OCR
- Organize data using Classify and See Also
- Share data with your team

BROWSE THE INTERNET

Besides being a knowledge and information database, DEVONthink has built-in web browsing capabilities. This allows you to browse and capture online information directly in a database.
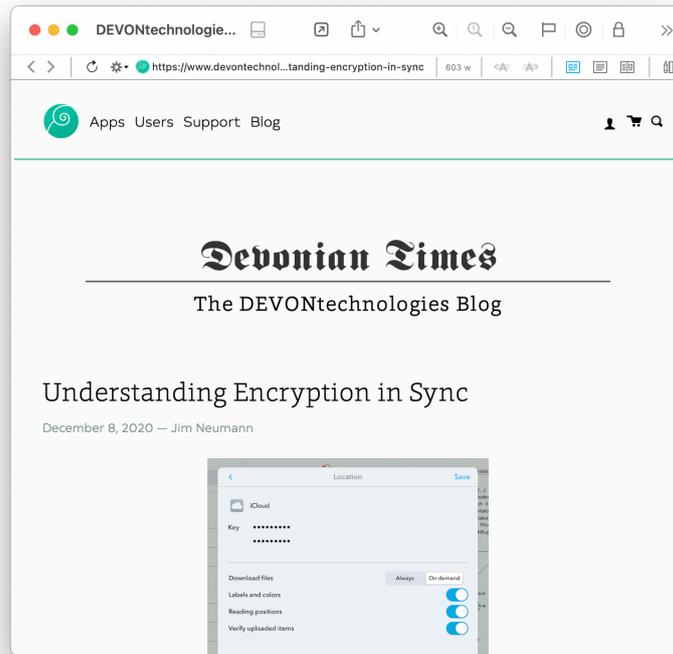
DEVONthink enables you to treat web pages the same way as you treat documents. Whenever you select a bookmark, DEVONthink immediately loads and displays its content live from the internet in the *View/Edit* pane. You can also open a page in a separate document window. Archive the complete page for offline viewing, add a new bookmark, or drag elements from the page into your database.

DEVONthink also handles RSS, RDF, Atom, and JSON news feeds, either through feed documents or by simply displaying them via the built-in web browser. Stay up-to-date with your subject and clip important information right away.

Possible uses:

- Visit frequently used web sites in a convenient interface
- Integrate "live" content from the web with your other documents
- Grab data from web sites and store it in DEVONthink
- Capture and archive complete web pages

Continue to read here:

- Capture data from the Web
- Create new bookmarks or HTML documents
- View "live" and local HTML pages
- Integrate news feeds with your data

CAPTURE DATA FROM THE WEB
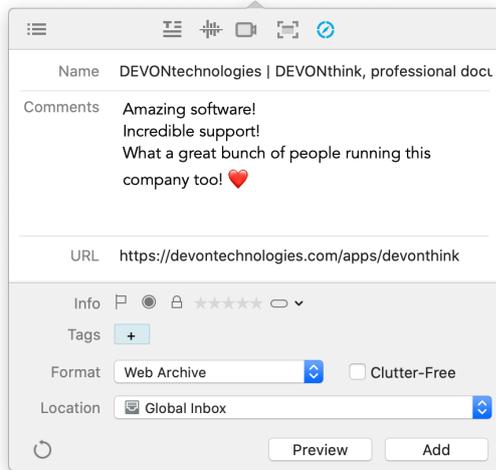
Increasingly, information is provided not on paper but directly through web sites, blogs, online news sites, social media, and user forums. DEVONthink offers a variety of options for conveniently capturing data from the web:

- **Bookmark:** Captures only the address (URL, uniform resource locator) of the page.
- **HTML page:** Saves the source code of the page to the database, but images are downloaded from the web each time the page is displayed in the database.
- **Web archive:** Saves both the HTML code and all resources, like images, necessary to display the page.
- **Rich/Plain text:** Grabs selected text/images and hyperlinks, but avoids saving unwanted areas of the page to the database. A plain text capture will not include formatting, images or links.
- **PDF:** "Freezes" the web page, just like printing to paper. PDFs from web pages can be paginated or non-paginated.

All of these options, except the bookmark, capture the text content of the page (or a selected area of it) and hyperlinks if present, and preserve the text information for searches in DEVONthink.

> Note: There are a number of web sites that prohibit use of some of the capture options described above. A secure banking site or a university portal to journals may direct a bookmarklet or script capture option to the login page, which will be captured instead of the desired content. A capture option that requires re-download of the page on such sites will capture only the login page. The page always can be selected and captured as rich or plain text. The viewed page can be captured by "printing" it as PDF to the database.

Possible uses:

- Capture important news in an easily searchable database
- Collect all relevant data for your project in one place
- Collect links to web pages and captured data about the same subject in one group
- Save data from the web in future-proof formats such as PDF

Continue to read here:

- Capture data using Services
- Capture data using scripts
- Capture data with bookmarklets or browser extensions
- Add the global inbox to the Finder's sidebar
- "Print" any web page or document as PDF to your database

CATALOG YOUR SD CARDS OR DVDS

By using the Index function, you can use DEVONthink to set up a catalog for your data DVDs, SD cards, or other removable volumes. Create a group for each disk by using the index function, and organize your disks/ groups in any way you like. When you need a specific file, search for it in DEVONthink, insert the volume, Control-click the file in DEVONthink, and select *Open With* to open the original file on the removable volume.

Note you will only see a thumbnail if the disk or volume is not available. A message to *Mount Volume* will be shown if a server volume is unavailable. Clicking this button should remount the volume, if possible. For removable disks, DVDs, etc., you will have to reinsert the media.

Possible uses:

- Find files even when they're on a removable volume that is not currently mounted
- Create a virtual library of SD cards and other media
- Integrate static documents with other project-related data

Continue to read here:

- Import or index files
- Search your database
- Launch the original file of an index item

CATALOG YOUR PHOTOS AND MEDIA FILES

Besides storing text documents and PDF files, DEVONthink can also contain multimedia data such as photos, illustrations, music, or movies in your databases.

While not designed to replace Photos or Music, DEVONthink can be used as a repository for images you frequently use or as an interface to your music library (if you don't like other music software). If you do not want to import these files, leave them where they are in the file system. You can index the files instead and access them from within DEVONthink See also p. 140ff

Possible uses:

- Create a dedicated database for photos only
- View your images in full screen mode
- Include project-related images, audio, and video in your databases
- Play your music from within your work environment

Continue to read here:

- Import or index files
- View files as thumbnails
- View images and movies
- Search your database

COLLECT TEXT SNIPPETS AND OTHER VALUABLE DATA

Use macOS's handy *Services* menu for collecting and organizing information bits and snippets to DEVONthink.
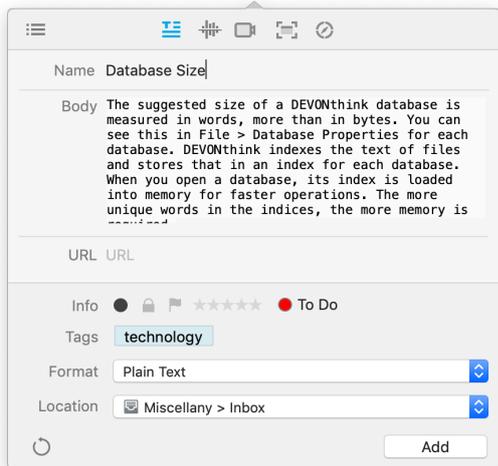
Select any piece of data and capture it to the currently open database with a keystroke or a quick visit to the *Services* menu. Most true macOS applications such as TextEdit, Safari, or DEVONthink itself support this mechanism.

DEVONthink automatically sets the title of the newly created snippet to the first line of text, so there's a good chance that you won't even need to rename it. New snippets are created in the global inbox or the location you choose. Also, DEVONthink can help classify and file the items using its built-in artificial intelligence.

Possible uses:

- Collect recent news from your favorite web sites
- Keep important information from any source and your other project-related documents together
- Create an info collection for a specific topic

Continue to read here:

- Capture a note quickly using the Services menu
- Use the Sorter
- Drag text clippings to the Groups panel

INDEX FILES ON YOUR HARD DRIVE

Besides importing documents, DEVONthink can also index files. When indexing files, DEVONthink reads the contents of the file and stores it for internal reference, but leaves the files in place in the Finder. Use indexing for easily accessing information stored on removable volumes, creating a library of all important documents regardless where they are physically stored, or integrating files stored elsewhere with your documents in DEVONthink. See also p. 53ff

Possible uses:

- Keep the folder structures you've created in the Finder, while allowing access to DEVONthink
- Create a front-end for your document collection
- Integrate indexed items with imported and items you've created in DEVONthink

Continue to read here:

- Import or index files
- Search your database
- Launch the original file of an indexed item

MANAGE YOUR BOOKMARKS

With its integrated, document-based web browser, DEVONthink can be used as a bookmark manager. Organize all your

bookmarks as bookmark documents and visit the web sites by simply selecting them with a preview visible. DEVONthink loads the page and displays it in the *View/Edit* pane.
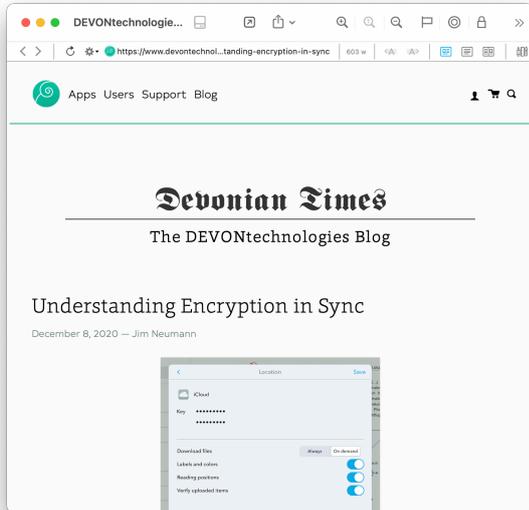
If you want to open the web page in your default browser, simply Control-click the bookmark and choose *Launch URL* from the context menu.

Possible uses:

- Manage your bookmarks
- Keep project-related web pages and other documents together
- Visit frequently used web sites in a convenient interface
- Integrate "live" content from the web with your other documents
- Grab data from web sites and store it in DEVONthink

Continue to read here:

- Create a new bookmark
- View "live" and local HTML pages
- Drag URLs to the Sorter

SHARE PROJECT DATA

With its built-in synchronization, DEVONthink allows you to have your databases on multiple Apple devices. Changes made on one machine propagate to the others, keeping them in sync. It can also be used to manage a shared project workspace.
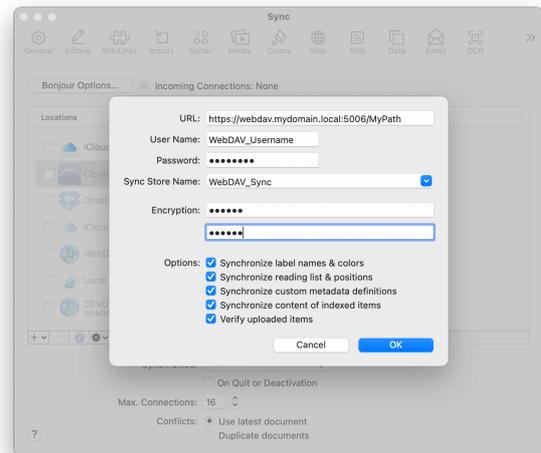
Keep all your project-related data in an easy to structure database and share it with your team members. Use a shared WebDAV volume, a shared cloud account, a local file server, or direct connections to propagate new data to the team automatically.
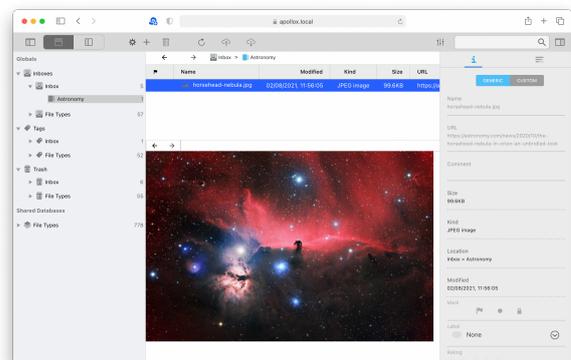
And if your coworkers don't use a Mac give them access via DEVONthink's built-in web server. You can set up web users and fine-

tune the access permissions so that visitors only gets access to what they should see. SSL/TLS encrypts all data in transit.

Possible uses:

- Organize project files, use advanced feature such as tags and smart groups
- Add new data from any team member's computer or even iOS device running DEVONthink To Go
- Integrate "live" data, e.g., web pages or newsfeeds, with your other documents
- Give your colleagues using Windows or Linux access to your knowledge with web sharing

Continue to read here:

- Set up sync to share data with your team members
- Set up the local web server
- Add smart groups to organize data automatically
- Add newsfeeds

READ NEWS FEEDS
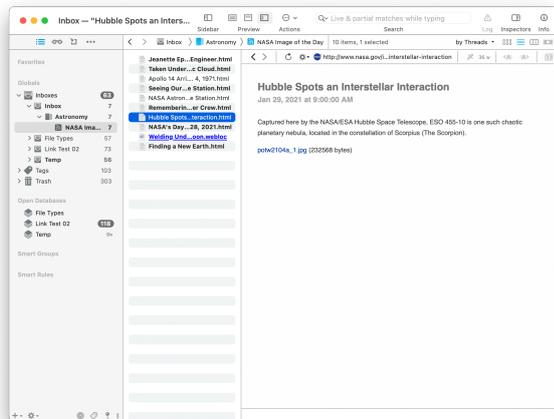
DEVONthink comes with built-in support for RSS, RDF, Atom, and JSON news feeds, which makes it a reliable basic news reader.

In addition, its integrated web browser supports news feeds and displays them like any other web page. Use its document-oriented structure to organize bookmarks and store news feeds like internet-updated smart groups.

Mix live news feeds with static documents, e.g., in your project materials.

Possible uses:

- Read your daily news in a convenient interface
- Integrate "live" newsfeeds with your other documents
- Grab interesting information easily and store it in DEVONthink

Continue to read here:

- Create a new bookmark or HTML document
- View "live" web pages and news feeds
- Create a news feed document

TAKE NOTES

DEVONthink is perfectly suited for taking notes and organizing them.

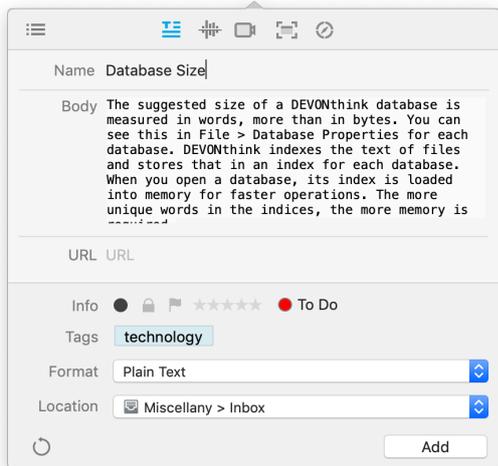Quickly create new notes and file them in your database using DEVONthink's *Tools > Take Note* command to open the *Sorter* (or an independent *Take Note* panel, if the *Sorter* is hidden). Alternatively, use the *Take Note* command in the *Dock menu*. Notes can be created in plain or rich text, Markdown, or formatted note formats.

Possible uses:

- Write down ideas before they vanish
- Take quick phone messages
- Keep project notes and your other project-related documents together

Continue to read here:

- Create new documents
- Create a new note using the Dock menu
- Revise notes and documents using the built-in rich text editor

WRITE TEXTS AND OUTLINE PROJECTS

With its hierarchical group structure, organization, and navigation functions, as well as its advanced text editing capabilities and

full screen mode, DEVONthink is perfectly suited for writing many kinds of documents, from notes to whole books.
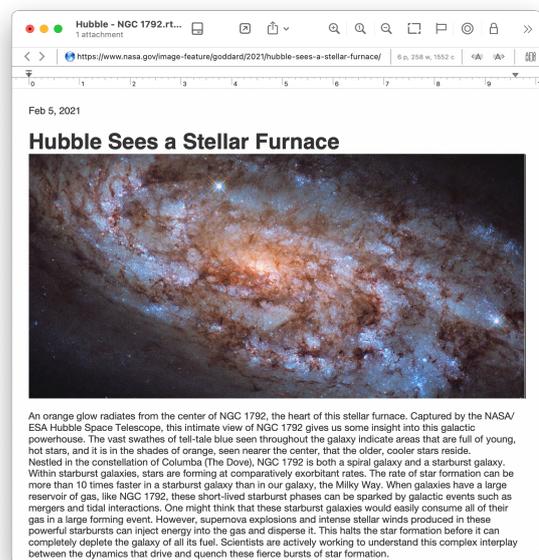
Create new documents with just one click, find related documents in your database, and connect them with Wiki-style or static cross-links. Working these documents in your databases, you can switch from one document to another with just one click, and manage even large projects with ease.

Utilize markers, like flags or color labels to help visually distinguish items, by importance or other criteria using label names. And similar to the Finder, you can create groups, as deeply (or shallowly) nested as you'd like.

Possible uses:

- Write notes, white papers, and letters
- Write and organize book chapters
- Organize your ideas or projects in outlines
- Create a network of information for your projects or interests

Continue to read here:

- [Create new documents](#)
- [Use the built-in rich text editor](#)

- [Use the See Also & Classify Inspector](#)
- [Use the Concordance Inspector](#)

DOCUMENTS

IN THIS CHAPTER

As DEVONthink is an information and document management application, it supports importing many different file types. While not all formats are editable, if a QuickLook plugin is installed on the machine, the files should be viewable. Also, if a Spotlight importer for these files is installed, the files should be indexed by DEVONthink and searchable. In addition, DEVONthink supports creating some common types directly in the application.

In the General section of this chapter, we will discuss the essential window components you'll use when viewing or editing these documents. Following that are chapters for the types of files DEVONthink supports.

GENERAL

When working with files in DEVONthink, they can be viewed in the view/edit pane of a main window or in a separate document window. When viewing a document, there are two essential components visible: the view/edit area and the navigation bar. These will always be available when working with a selected file. Additionally, there are a few optional components available: the editing bar (for compatible formats), the tag bar, and the context menu.

VIEW/EDIT PANE

The view/edit pane is where you can see or edit the current document (with compatible files). Each file type you view has its own tools, context menu commands, and keyboard shortcuts.

NAVIGATION BAR

At the top of the view/edit pane, DEVONthink shows a navigation bar that gives you access to some additional tools that deal directly with the contents of the document. Which tools are available depends on the type of the document you are viewing. The options below are shown in the navigation bar for most file types. Specific options are shown in the separate sections:

- ‹ Navigates back to the last visited document after following a link.
- › Navigates back to the next visited document after going back.
- ↻ Reloads the displayed page in a web view. Only visible for, e.g., bookmarks.
- ✿ Shows an action menu with options for opening the shown page in Safari, copy its address, or capture the page in a variety of formats.

⚔ Shows if the document is locked or editable.

◁ᴀ Scrolls to the previous highlight, e.g., a search term occurrence.

ᴀ▷ Scrolls to the next highlight, e.g., a search term occurrence.

⬇ Scrolls to the next page of the displayed document.

⬆ Scrolls to the previous page of the displayed document.

▤ Switches to *Text Alternative* mode. Useful for selecting text in uneditable formats, e.g., Word documents.

▥ Switches to *Best Alternative* mode. For Markdown documents, this is the rendered HTML view.

- **Word Count:** Shows the number of paragraphs, words, and characters of the displayed text.

- **URL:** Shows the URL associated with the displayed item, if one is present. If a PDF annotation is selected the URL field shows the associated URL if available. Click to launch the URL in its default application. Hold the ⌥ Option or the ⌘ Command key to open the URL in a new tab. Holding ⇧⌥ or ⇧⌘ opens the URL in a new tab and selects it.

- **Page Count:** Shows the number of pages as well as the page number of the currently displayed page. Click the page number in PDF or PostScript documents and enter a page number to jump directly to that page.

EDITING BAR

For some formats, e.g., rich text or sheets, there is another bar available: the Editing bar. If you click this icon ▥▥, the editing bar will appear in place of the Navigation bar.

This offers quick access to some editing tools related to the file type you're working on. See the appropriate file type section for more info.

TAG BAR

The tag bar, which can be shown or hidden, shows all tags associated with the document. Click the tag bar and type to add tags; select a tag and press the ⌫ Backspace or ⌦ Delete key to remove it. See also p. 14ff

When you type the name of a tag, DEVONthink offers automatic completion. Choose the right option with the mouse or the arrow keys and press ↵ Return or Enter to accept it. Press ⎋ Escape to use whatever you entered. Auto-completion prefers ordinary tags (tags represented in the *Tags* group) over groups used as tags, and also matches sub-strings. Press ⇥ Tab to enter another tag.

> Note: The tag bar is also visible for multiple selected documents when all the documents have the same tags attached. Use it to change the tags on multiple documents.

CONTEXT MENU ITEMS

If you Control-click in many types of documents in DEVONthink, you are presented with a context menu showing many options. The options displayed depend on what you're clicking; e.g., selected text, and in whether you're in an editing or preview mode. As many of these commands are the same for most formats, we have provided a list in

the appendix. Items specific to a format are listed in their respective sections in this chapter.

TOOLBAR & SHORTCUTS

DEVONthink can display documents in separate windows when you double-click the documents in a main window. Depending on the type of document, the tools in the toolbar can change. Even though not all tools are always present in the default toolbar for a particular type, you can easily add some by choosing *View > Customize Toolbar*. Changes made to the toolbar will be persistent for that file type, but are independent of the toolbars of other types.

Please find a list of toolbar items and shortcuts in the appendix.

> Note: Documents are automatically saved every five minutes after the last modification, when deactivating the window, or when quitting DEVONthink.

DOCUMENT LINKING

Documents in DEVONthink are independent items but often have context relationships with other documents in your databases. Efficiently creating and using these links is key in many peoples' use cases. DEVONthink supports three types of links.

LINK TYPES

WikiLinks: WikiLinks are specialized links found in plain text, rich text, and Markdown documents. Use them to link to existing items or create documents on-the-fly. For existing items, these links are automatically

detected depending on the method chosen in the *WikiLinks* preferences. Note these are not item links, which are discussed below.

Relative and Absolute Links: Most often used in Markdown documents and also supported in HTML-based formats, these are links similar to what is seen in the source code of web pages; e.g., `/stylesheets/styles.css`. Note, these are not item links. See the subsection on linking in the Markdown section of this chapter for more information.

Item Links: Many applications today have a URL scheme — a special URL that provides some extra functionality for that application. In DEVONthink, every item has a unique URL, pointing only to that item. When used with in-application documents or in external applications that support URL schemes, the item link will open the linked document in our software. In some cases, the link may even contain certain parameters to do things like open a video to a specific time.

Item links are either incoming and outgoing links. The two types of links function as sides of one operation. If you create an item link to an image, the file will have an outgoing link detected. The image you have linked to will have an incoming link detected since the file has a link pointing to it. Documents with these links will have a special property icon displayed to the right of the filename in the item list. You can display a sortable *Incoming Item Links* and *Outgoing Item Links* column in the headers of the item list in List view. There also are incoming and outgoing item link criteria usable in toolbar searches, smart groups, smart rules, and AppleScript.

One of the advantages of using item links is the link title of item links can be updated when you rename a linked document. To do this, enable the *Update name of item links automatically* options *WikiLinks* preferences. You can also leave this disabled and use the *Tools > Item Links > Update Name of Item Links* command to manually update a document. To switch from WikiLinks to item links in a document, use the *Tools > Item Links > Convert WikiLinks to Item Links* command.

> Note: Item links are also discussed in the Automation > Item Links section of this help.

CREATING LINKS

Making links to other documents should be easy to do. However, working within the constraints of certain file formats sometimes requires different methods to create them. Listed below are the most common ways to add links between documents.

- **Make Link:** In rich text files, you can select words and choose *Format > Make Link* to create an active hyperlink of the selected words. Clicking on the hyperlink will generate a new WikiLinked document.
- **Copy and Paste:** Select an item in the item list and choose *Copy Item Link*. This captures the item's unique link to the clipboard so you can paste it into another document or even another application. Some other types of links can be captured, e.g., page links. Item linking methods specific to certain file formats are covered in their respective sections of this chapter.
- **Add Link:** For text in rich text and formatted notes, you can select words and

choose *Format > Add Link*. You can then add a URL, including an item link, to create an active hyperlink of the selected words.

- **Drag and Drop:** You can Option-Command-drag and drop a file into a compatible document to insert an item link. This is an efficient way to insert links into rich text or Markdown documents.
- **Insert Link:** *Edit > Insert > Item Link* opens the Insert Item Link popover, allowing you to add an item link to a document.

VIEWING LINKS

View incoming and outgoing links in the Document > Links inspector. You'll also see web links in a document are listed as outgoing links.

PLAIN AND RICH TEXTS
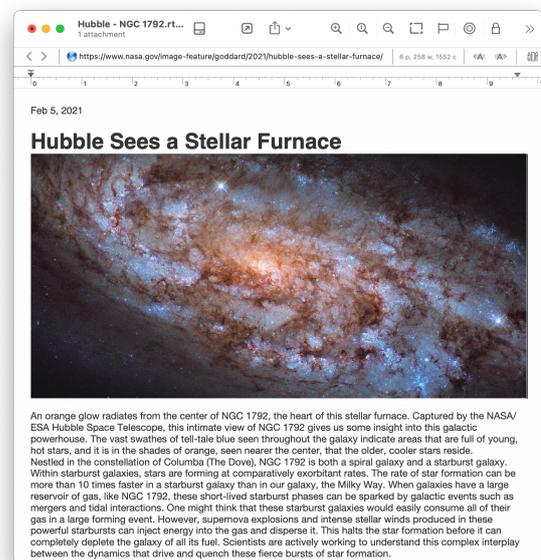
PLAIN TEXT

Plain text files may seem too simple to be truly useful. No styling. No images. Nothing but text. But the reality is these simple files

are underlying a lot of your daily experience. From the HTML code instructing your browser how to display a web site, to the code DEVONthink is written in, plain text is very powerful. DEVONthink supports plain text files as a native, editable format.

Plain text files can be created via *Data > New > Plain Text*.

RICH TEXT

Word processing applications brought us text with flair. Need some bold and italic text? How about adding a photo to the page? And color? These applications were providing it all. But their formats are proprietary so if you don't have the creator application, you can't open the file or you'll have to convert it first. The rich text format provides a useful text format that supports formatted text. These files are generally cross-platform compatible and editable in many applications. DEVONthink uses the same text engine found in Apple TextEdit, so it's an easy transition if you're already familiar with it.

You can attach other documents to rich text documents simply by dragging them into the text. Technically the rich text document becomes an `.rtfd` package and the dragged file is saved as part of the package. Using the context menu, you can show an attachment's content in a Quick Look preview. Also, if you double-click an attachment, it will open in the system default application.

Rich text files can be created via *Data > New > Rich Text*.

EDITING BAR

The navigation bar for rich text files includes the *Editing Bar*. Click this ⏸ icon and the editing bar will appear in place of the navigation bar. The tools available here consist of:

⊞ Edit the formatting of a list.

≡ Edit parameters of a table.

A Increase the size of the font.

A Decrease the size of the font.

A₈c Set characters to be subscript.

Aᴮᶜ Set characters to be superscript.

ᴀʙᴄ Adjust the line spacing of selected text.

B Set bold on the text.

I Set italic on the text.

U Set underlines on the text.

S Set strikethrough on the text.

🅰 Highlight selected text. This uses the currently selected highlight color.

🔗 Add or edit a link applied to the selected text.

🔗 Convert selected text into an active link. This can be used to dynamically create Wiki documents.

▭ Show or hide the ruler. Place tab stops with the mouse, then remove them by dragging them off the ruler. Drag new tab stops (left aligned, centered, right aligned, or decimal aligned) from the repository at the right side to their desired positions on the ruler. Use the mouse to adjust the left and right margins and indent.

A Show the *Fonts* panel.

🌈 Show the *Color Picker*.

THE FORMAT BAR

In addition to formatting options in the *Format menu* and the simple controls in the editing bar, DEVONthink provides another toolbar just for rich text editing. Select *Format > Show Format Bar* to display a set of rich text controls under the toolbar in main or document windows. Similar to TextEdit, it provides the following options:

- **Styles:** Select a predefined text style from the pop-up menu. To define your own styles, choose *Other* to open the standard macOS style editor. In the style editor, navigate back and forth through the styles of your document or the stored favorite styles. (Use the radio buttons to switch between document and favorite styles.) Click *Select* to select all occurrences of text with the displayed style in the document, click *Apply* to apply the style to selected text, or click *Done* to leave the style editor. To add a style from your document to the favorites, click *Add To Favorites*; to remove a favorite, click *Remove From Favorites*.
- **Font Controls:** Displaying three dropdown menus for, choosing the font face, font weight, and font size.
- **Colors:** Two buttons are available for setting the text and background color.
- **Basic Styling:** Allows you to choose bold, italic, or underlines.
- **Alignment:** Align the current paragraph (the one with the insertion caret inside) left, centered, justified, or right by clicking the according alignment buttons in the ruler.
- **Spacing:** Choose the desired spacing for the current paragraph from the *Spacing*

pop-up menu. Choose *Other* to enter values other than the ones shown.

- **Lists:** Make the current paragraph a list (indented and with a bullet or numbered) by choosing the desired list style from the *Lists* pop-up menu. Choose *Other* to define your own list style.

Note: The built-in "mini outliner" is a nice feature of the macOS rich text editor. On any blank line in a rich text document, type ⌥⇥ Option-Tab to create a bullet point (macOS shows dashes instead of bullets). Press ↵ Return for the next item, and so on. Additional ⌥⇥ will increase the indentation; a ↵ on a blank list line will decrease it. The mini outliner uses hyphens to indicate list items by default.

CONTEXT MENU

In addition to the context menu items available with text selections, rich text files also feature these specific commands:

- **Copy Paragraph Link:** Copies a link to the current document, but appends a pointer to the selected paragraph.
- **Insert > ...:** Inserts special characters or items into the document.
- **Quick Look Attachment:** Opens a Quick Look panel for the selected attachment in a rich text file.
- **Split Document:** Splits the document at the current insertion position. A new document is created for the text after the cursor position and removed from the current document. This can be used in rich text and plain text, including Markdown content in edit mode.
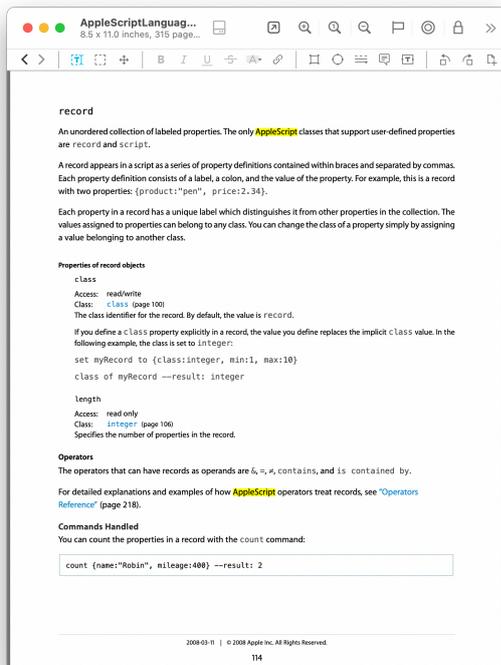
ITEM LINKING

In addition to the document's standard item link, plain and rich text files support this alternative item link:

- **Paragraph Link:** Link to the paragraph of the selected text.

Alternate item links are available in the context menu in the view/edit pane or when holding the *Shift* key while viewing the *Edit* menu.

PDFS

PDFs are a very common format, from academia and online bill payments to equipment manuals. Fortunately, they are first-class citizens can be viewed and annotated within DEVONthink. The annotation tools should be familiar and include options like arrows, text, and link

annotations. While DEVONthink may not have some options found in specialized PDF applications, it is still a very capable PDF tool.

PDF files can be imported or indexed. They can also be created by capturing web content, directly in DEVONthink or via our browser extension, *Clip to DEVONthink*. You can also use the PDF Service *Save PDF to DEVONthink 3* in the PDF dropdown of the print dialogs of most macOS applications. This will print a paginated PDF to your database. PDFs often come directly from text sources, like word processing or page layout applications. The content of these files should be indexed and searchable when added to your database.

You can also acquire PDFs from scanned documents. These files will only have a text layer if OCR is done on them. For scanned PDFs without a text layer, you can do OCR directly in DEVONthink when needed.

Viewing PDFs: When you view a PDF it will display as single or two side-by-side pages. Choose the desired option in the *View > PDF Display* options. When the document opens, the pages are viewed as the entire page or magnified to the width of the view/edit pane. You can choose how the document is displayed in the *View > Zoom* submenu. If you'd like to always view PDFs with a specific *Zoom* option, you can set a default in the *Files > Multimedia > PDF Display* preferences. Enable *Automatically resize* then choose a single or double page option. The *Zoom* option used is controlled as shown below:

- **Continuous:** Zoom to Width
- **Non-Continuous:** Zoom to Fit

NAVIGATION BAR

In the navigation bar for PDFs, the number of pages in the document is displayed. Clicking on this navigation bar item opens a *Go to page* function so you can quickly jump to a specific page. In addition, there are options to move to the first, previous, next, or last page.

EDITING BAR AND ANNOTATIONS

The navigation bar for PDF files includes the *Editing Bar*, providing access to editing and annotation tools. Click this ⫿⫿⫿ and the editing bar will replace the navigation bar. The tools available here consist of:

⊺⊺ Select text for copy or highlighting.

⸦⸧ Select annotations on the page. Double-click an annotation to edit its properties. Press the ⌫ Delete key to remove the annotation.

✛ Move or scroll the current page.

U̲ Underline selected text in the document.

S̶ Strike through selected text in the document.

🄰 Apply or remove highlighting on selected text. The highlight color will be the color selected in *Format > Highlight Color*. Alternately, click and hold to select another color.

🔗 Add a link to a selected area. Click and drag over an area to establish a hotspot for the link to be active. For the *Link Type*, choose *Link within PDF*, navigate to another page and click *Set* to create a link between pages within the same PDF. Alternatively, choose *URL* and enter a URL to an external item. This can be a web site

address, or drag files from the Finder or your DEVONthink databases into this field.

⬚ Add a rectangle annotation.

◯ Add an oval annotation.

⚌ Add a line annotation.

🗩 Add a note annotation.

🄣 Add a text annotation. Drag to create a text box. To change the font, choose *Format > Font > Show Fonts..*. Note only one font can apply to each text annotation.

↺ Rotate the current page left (counter-clockwise).

↻ Rotate the current page right (clockwise).

🗋 Add a new blank page before the current page.

🗋 Delete the current page.

⇅ Reverse the page order of the document.

The annotation tools in the editing bar are also available in the Tools > Annotate menu.

CONTEXT MENU

In addition to many common context menu items there are also a few PDF-specific options:

- **Automatically Resize:** When checked, the zoom factor adjusts to the width of the view/edit pane or document window.
- **Delete Annotation:** Deletes the selected annotations.
- **Single Page/Two Page (Continuous):** Displays the PDF as single or double pages. Use the *Continuous* option to allow quick scrolling through the pages as one continuous document.
- **Previous/Next Page:** Jumps to the previous or next page.
- **Rotate Left/Right:** Rotates the current page 90 degrees in the selected direction.

- **Insert Blank Page:** Insert a new blank page before the current page.
- **Delete Page:** Delete the current page.
- **Reverse Page Order:** Reverses the order of the pages in the entire document.

INSPECTORS

There are a few inspector panes with information specifically pertaining to PDF documents: *Info > Properties*, *Content* inspectors, and *Document > Annotations*.

Properties: The *Properties* inspector displays PDF metadata from some third-party applications, e.g., Adobe Acrobat. This will display things like a title, copyright, author, and keywords, if available.

Content: The *Table of Contents* inspector displays a PDF's table of contents, if one exists. You can navigate through the document with the section markers in it. The *Thumbnails* inspector displays page thumbnails of the PDF currently displayed in the view/edit pane. You can navigate via the thumbnails. You can also, drag to rearrange the pages, or even drag them out of the inspector to export them. Alternately, drag other PDFs into the inspector to merge one document into another. Commands for deleting or inserting blank pages are found in the *Tools > PDF* submenu. And the *Split Document* command becomes available in the *Tools* and context menus when you've selected a page thumbnail.

Document: If you are annotating your PDFs, the *Document > Annotations* inspector is where you can see and manage the document's annotations. Edits made with

the annotation tools mentioned above will appear here. You can also selectively delete annotations in this inspector.

ITEM LINKING

In addition to the document's standard item link, PDF documents support these alternative item links:

- **Page Link:** Links to the current page.
- **Selection Link:** Links to selected text.
- **Annotation Link:** Links to a selected annotation.

Alternate item links are available in the context menu in the view/edit pane or the *Thumbnails* inspector. The alternate links are also accessible when holding the *Shift* key while viewing the *Edit* menu.

MARKDOWN DOCUMENTS
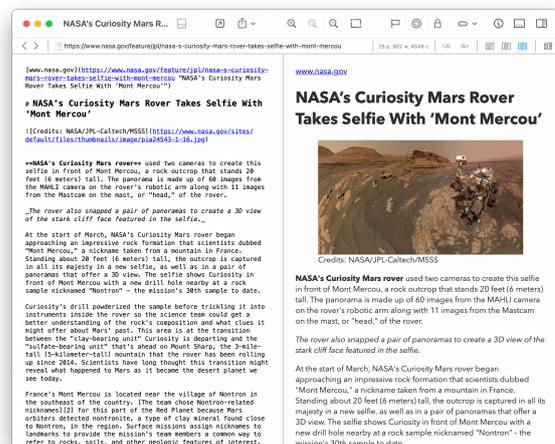
Markdown is a simple formatting language invented by John Gruber that has gained in popularity over the past few years. It allows you to write in plain text, using some easily learned control characters, to produce nicely

rendered HTML output. With some styling and ingenuity, you can create a wide variety of documents.

Markdown files can be imported or created via *Data > New > Markdown text*.

Editing: Writing Markdown is essentially the same as writing plain text documents. As you're writing you can switch easily between a plain text editor and the rendered view or even view both simultaneously using the side-by-side view via the *View > Document Display* commands.

When editing the source of the Markdown, DEVONthink's hybrid source rendering will display many types of formatting or elements as you type. For example, typing `**important**` will display the plain text in bold; `` `{"name":"Audrey Hepburn"}` `` will display as a code block, etc. If you'd prefer to see no formatting in the source code, you can disable *WYSIWYG editing* in *Settings > Files > Markdown*.

The currently supported WYSIWYG types, including CriticMarkup syntax, are:

Formatting:

- **Bold:** `**bold**`.
- **Italic:** `*italic*` or `_italic_`.
- **Bold-Italic:** `***bold-italic***`.
- **Highlight:** `{==highlight==}`.
- **Underscore:** `{++underscore++}`.
- **Strikethrough:** `{--strikethrough--}`.
- **Subscript:** `~subscript~`.
- **Superscript:** `^superscript^`.

Elements:

- **Header:** `# Header`. Prefix each header with the appropriate number of pound signs. Supports header levels 1 through 6.
- **Link:** `[Link Text](URL)` or `<URL>`.
- **Blockquote:** `>` preceding each line in the quote.
- **Code block:** `` `code terms` ``. Note: Those are backticks, found on the tilde (~) key.
- **Fenced code block:** ` ``` ` - triple backticks on a line above and below the code. To show syntax coloring in the rendered view, see the Markdown Extensions: Prism subsection below.
- **Metadata headers:** `attribute:` . As noted below, these must be the first lines in the document.
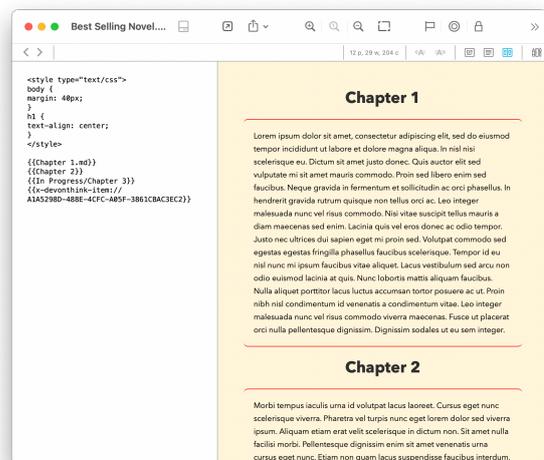
File Transclusion: A special feature of DEVONthink's Markdown handling is support for file transclusion. This provides the capability of displaying the contents of one file inside the contents of a Markdown file. This supports displaying the contents of: plain text, rich text, HTML, formatted notes, sheet, or more commonly, other Markdown files. For example, you may have several chapters of a book written in individual

Markdown files. Use transclusion to view them all as one document with out the need to merge or copy and paste the content between files, similar to some popular writing applications.

To use transclusion, just enter the desired document's name or item link between double braces, e.g., `{{Chapter 1}}`. Transclusion supports filenames with and without extensions, relative and absolute links, as well as item links. It also supports the Obsidian syntax, e.g., `![[Chapter 2.md]]`.

Styling: Styling your Markdown documents can be done with internal styling or externally referenced stylesheets. If you have a specific stylesheet you'd like to use globally, you can specify one in *Settings > Files > Style Sheet..*. Here are the options:

- **Internal styling:** `<style type="text/css"> … </style>`
- **HTML Link:** `<link rel="stylesheet" type="text/css" href="css/styles.css" />`
- **XHTML Link:** `CSS: css/styles.css.` XHTML headers must be placed at the very top of the document.

> Note: If no specific styling is applied, the font choice in *Settings > Editing > Rich Text & Note Font* will be used when previewing Markdown documents.

Linking: You can reference local images, scripts, and other resources using item links, downward-relative (traveling subgroups; it's not possible to travel up with '..' as documents can have multiple parents) or absolute (start with a forward slash) paths. Here are examples of linking an image:

- `![link](item.png)`: Use this when linking to an item in the same group as the Markdown document.
- `![link](group/item.png)`: Use this when linking to an item in a sub-group of the group containing the Markdown document.
- `![link](/group/item)`: Use this when you are linking to an item in a group outside the group containing the Markdown document. For example, if you have common resources in a specific group, you can link to them using this format.

Linking Images: Regarding keeping track of your linked images, if you drag or paste images into a Markdown document, they will be imported into a group in the document's location if *Preference > Files > Markdown > Import images to group* is enabled. The group name is also assigned in the preferences, with the default name being *Assets*. This group will also contain images from web content clipped as Markdown documents if the above option is enabled.

If you enter a name in the preferences mentioned above, this will create a subgroup in the location of the Markdown document and a relative link will be created in the Markdown document. If you add a name preceded by a forward slash, e.g., `/Markdown`, this will create a group in the root of the database and an item link placed into the Markdown text. You can even set a more precise location, e.g., `/Inbox/Markdown/Images`.

Linking Other File Types: If you have enabled automatic *WikiLinks > Names & Aliases*, documents can be detected as you write your Markdown. These WikiLinks are active when

previewing the file and are also preserved in a website export or conversion to other formats.

Drag and drop items into a Markdown document to add the appropriate links. Drag and drop documents while holding ⌘-⌥ will create a URL with an [item link](). Dropping an image will create a properly formatted Markdown image link. Drop `.mp3` or `.mp4` files to insert a playable multimedia link.

Another option for inserting links into Markdown documents, Control-click while editing and choose *Insert Link To* from the context menu. A Markdown formatted link will be automatically inserted for you. For images, just add an exclamation point before the link if you want it to display in the rendered document.

You can learn more about Markdown and its syntax on [Gruber's Markdown pages]() or the [MultiMarkdown]() syntax guide.

Metadata: One of the features of MultiMarkdown is [metadata headers](). These allow you to add non-displaying information about the document, like authors, dates, and even linked stylesheets. To use the feature, format the first line of the document with a colon, e.g., *Author: DEVONtechnologies*. This must be the first line of the document. Other metadata fields you wish to add must follow immediately after this first line.

However, if you would like the first line of your document to contain a colon, perhaps adding notes like *Developer: A. Edwards* and *Re: OCR*, just add a single blank line at the top of the document and the subsequent lines will be treated as normal paragraphs.

Emoji: For a little extra personalization, you can type Slack-style emoji, like `:grinning:`, directly in the Markdown document.

MARKDOWN EXTENSIONS

To support some features in Markdown that aren't built in, DEVONthink supports a handful of known and widely used extensions. The first option below requires no user interaction. The following three can be enabled in *[Settings > Files > Markdown]()*, if desired.

Highlighting, strikethrough, …: Text notations, e.g., for noting changes are sometimes necessary in documents. DEVONthink supports the features of the [CriticMarkup]() extension of Markdown. It also supports a few alternate highlighting syntaxes, like *==text==* and *^^text^^*, found in some other Markdown-enabled applications.

MathJax: Markdown is often used in academic situations, many using mathematical equations in their writing. DEVONthink supports the [Mathjax]() extension that will beautifully render LaTeX coded equations in your Markdown documents.

For more information on how MultiMarkdown handles equations, please see: [Math support in MultiMarkdown]().

Mermaid: Diagrams can be created in Markdown documents using the [Mermaid]() extension. Add a line of three backticks as shown ` ``mermaid`. Add the diagram code as needed and close the diagram with another line of three backticks. There are several diagram types available and discussed on the Mermaid.js website.

Prism: For those writing code in their Markdown, DEVONthink supports Lea Verou's [Prism](#) extension. Just add a line of three backticks ```` ```language- ```` and the language you're writing about. For example, ```` ```language-applescript ````. Remember to add a line of three backticks under the code to close it. This displays syntax highlighting of code blocks in the rendered output. Note it does not affect the Markdown source as you're writing, only the rendered output.

> Note: Not all languages supported by Prism are available. Additional languages may be added in the future if there's sufficient interest in them.

NAVIGATION BAR

When working with Markdown documents, you can switch between *Preview* and *Source* modes. There also is a special icon 📖 present in the navigation bar. This switches to *Side-by-Side* mode, allowing you to edit and preview the current document in two side-by-side panes.

CONTEXT MENU

Markdown documents support the same [context menu items](#) available with text selections in the document source.

ITEM LINKING

In addition to the document's standard item link, Markdown documents support this alternative item link:

- **Section Link:** Links to the section, e.g., an `h1` header, of the selected text.

Alternate item links are available in the context menu in the view/edit pane or when holding the *Shift* key while viewing the *[Edit](#)* menu.

HTML-BASED FORMATS
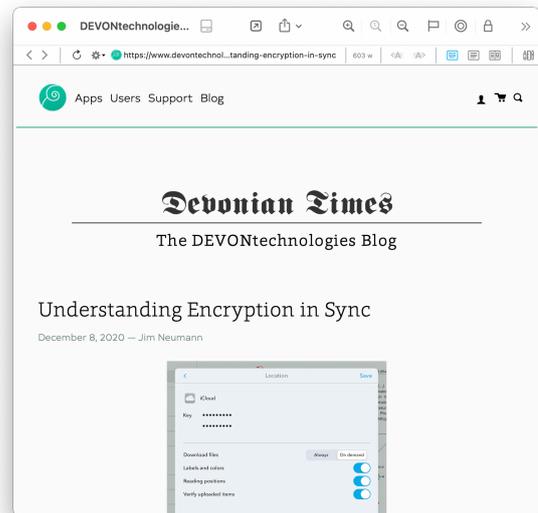
HTML-based files in DEVONthink include bookmarks, web archives, formatted notes, and RSS articles. These are formats that are viewable in web browsers and are also mobile-native.

BOOKMARKS

Bookmarks are exactly the same as the ones found in your web browser. With DEVONthink's ability to act as a browser, bookmarks can be a valuable part of your

experience. When using *File > Import > Bookmarks*, you can bring your bookmarks into DEVONthink easily. Though this depends on the capability of the individual browser, you may be able to drag links directly into your database. You can also capture them with DEVONthink's browser extension, *Clip to DEVONthink*.

> Note: If you import your bookmarks from a browser, this is a copy operation not a sync, i.e., if you modify bookmarks in your browser, this will have no effect on DEVONthink's contents. However, you can do another import to add the new bookmarks to your database without duplicating the previous ones.

In addition to importing bookmark files, they can be created via *Data > New > Bookmark*. Just provide a URL and title. If you don't enter a title, DEVONthink will attempt to detect and use the page title.

FORMATTED NOTES AND HTML

Formatted Notes: allow to write simple formatted text including embedded images that can be viewed on any system with just a web browser. While the range of formatting options is smaller that that of rich text they are much more compatible to today's standards. You can find all available formatting commands in the *Edit* and *Format* menus. When creating new formatted notes, DEVONthink will use the font set in *Settings > Editing > Rich Text & Note Font*. Captured or imported formatted notes, e.g., from Evernote, use the font set in *Settings > Web > Standard Font*

Technically formatted notes are based on HTML, the language of the world-wide web. Images are embedded directly into the HTML code so that formatted notes are completely self-contained. The HTML code is also cleaned from unnecessary tags and an identifying meta tag is inserted that lets DEVONthink distinguish formatted notes from normal HTML pages. Form tags, e.g., for checkboxes and input fields are not removed and the status of checkboxes and form fields is retained.

Bear in mind, the underlying markup in formatted notes can't be edited in DEVONthink. However, you can open the files in a compatible external editor, if you'd like.

> Note: Since images are completely embedded in the documents, the resulting file size can grow large very quickly. Resizing images before adding them is encouraged.

HTML Files: are similar to formatted notes, but they do not preserve the state of checkboxes and form fields. You also cannot add images by dragging them into the live editing view. However, you can edit the underlying HTML code using the *Source* and *Side-by-Side* modes found in the navigation bar.

Formatted notes can be imported or created via *Data > New > Formatted note*. When using the *Notes from Evernote* or *Folders & Attachments from Notes* options in the *File > Import* menu, the imported notes are formatted notes. HTML files can be imported or created via *Data > New > HTML page*.

WEB ARCHIVES

Web archives are a special HTML file format intended to create offline archives of individual web pages. The downloaded data preserves the look and feel of the page very closely. It is often a more useful capture option when a PDF would generate a very long page since web archives always view at the size determined by the browsing area.

They function in a similar fashion as formatted notes, so you can actually edit the captured contents and save your changes. This can be very handy for highlighting passages or removing unwanted elements, e.g., ads, in a captured web page. Also, since they are HTML files the underlying markup can be edited using the *Source* and *Side-by-Side* modes found in the navigation bar.

> Note: Web archives can be very useful with web pages using statically linked content. However, some popular and monetized sites get their contents dynamically from other sources, so the actual data is not in the underlying HTML. These pages may have missing content due to this, require an internet connection to display content, and run JavaScript. If you encounter this, a PDF may be a better archiving option.

Web archives files can't be directly made. They are the result of capturing web content, either in DEVONthink or using our browser extension.

> Note: Web archives made on macOS Mojave aren't necessarily compatible with earlier versions of macOS.

RSS

RSS feeds are special "web pages" that don't show as pages but as a stream of news articles. DEVONthink allows you to keep that news flowing directly into your databases. Supporting RSS, RDF, Atom, and JSON feeds, DEVONthink functions as a basic newsreader.

RSS feeds are treated as a special type of file that functions as a group. Feed articles are downloaded to the feed and saved in a format you specify in DEVONthink's *Settings > RSS > Feed Format*. The default is *Automatic* and saves summary files as HTML. The styling of the HTML articles is controlled by an internal CSS stylesheet specified in *Settings > RSS > Feed Style Sheet*. Other formats will get their styling from the source they're downloaded from.

> Note: When using an option other than *Automatic* as the feed format, DEVONthink must download the linked content and convert it to the appropriate format.

RSS feeds can be created via *Data > New > Feed*. Provide a URL and title. If you don't enter a title, DEVONthink will attempt to detect and use the feed's title.

EDITING BAR

Like rich text files, editing HTML-based files (excluding bookmarks) includes the *Editing Bar*. Click this 🎚 icon and the editing bar will appear in place of the navigation bar. The tools available here consist of:

A Increase the size of the font.

A Decrease the size of the font.

A₆ Set characters to be subscript.

A͟ᶜ Set characters to be superscript.

B Set bold on the text.

I Set italic on the text.

U̲ Set underlines on the text.

S̶ Set strikethrough on the text.

A̲ Highlight selected text. This uses the currently selected highlight color.

🔗 Add or edit a link applied to the selected text.

📏 Show or hide the ruler. Place tab stops with the mouse, then remove them by dragging them off the ruler. Drag new tab stops (left aligned, centered, right aligned, or decimal aligned) from the repository at the right side to their desired positions on the ruler. Use the mouse to adjust the left and right margins and indent.

A Show the *Fonts* panel.

🔴 Show the *Color Picker*.

CONTEXT MENU

In addition to the context menu commands available with text selections in a document, HTML based files often include these items:
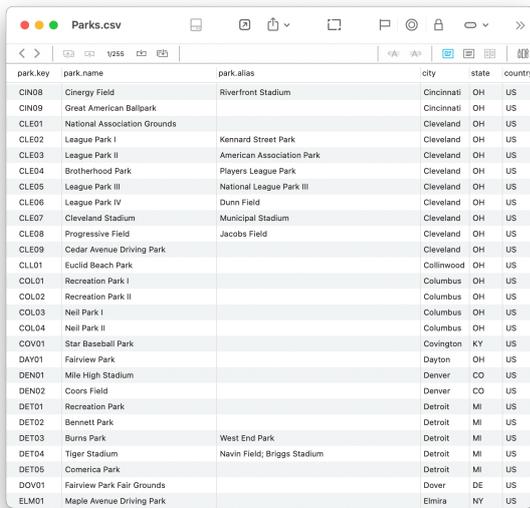
- **Add Page to Reading List:** Adds the current page the *Reading List* as a bookmark.
- **Capture …:** Captures the Control-clicked frame, image, link to the inbox of the current database.
- **Capture Page:** Captures the current page in the selected format to the inbox of the current database.
- **Copy … Address:** Copies the frame URL of a Control-clicked frame, image, page, or video to the clipboard.
- **Insert > …:** Inserts checkboxes into the document.

- **Open … in New Tab:** Opens a Control-clicked image, page, or video in a new DEVONthink tab.
- **Open Image in PhotoStickies:** Opens the image in PhotoStickies.
- **Open Page in Browser:** Opens the current page in your default web browser.
- **Open Page in DEVONagent:** Opens the current page in DEVONagent Pro.
- **Reload:** Reloads the page from the Internet.
- **Update Bookmark:** Updates the URL of this document to the current one, e.g., after navigating to a sub-page.
- **Update Captured Archive:** Updates the contents of a web archive file with the live version on the Internet.

- **Add Page to Downloads:** Adds the page address to the Download Manager.
- **Download Video:** Downloads the video using the Download Manager.

ITEM LINKING
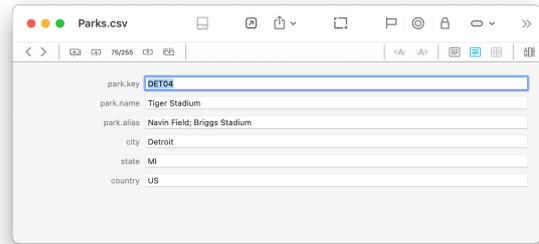
Web-based formats currently support no alternate item links.

SHEETS

[Sheets](#) contain text in a table and can be used to store any kind of tabular data from an address book to recording health statistics to employee timesheets. They are made up of records, defined by parameters displayed as a form or columns. For example, a simple sheet could contain a table of peoples' name, title, and department.

When you create a sheet or make changes to the sheet columns via the *Column Editor*, you will specify the column names and their types. An explanation of the data types can be found in the [Data](#) section of the appendix.

Sheets can be displayed as a table or a form via the *View > Document Display* menu or using the ▥ and ▤ buttons in the navigation bar. The table view is similar to standard spreadsheet views. Form view is similar to the record view e.g., in FileMaker.

Use sheets like any other document. Add new rows using *Tools > Sheets > Add Record*, delete rows by selecting them and using *Edit > Delete*. Alternatively, use the context menu. Click a cell to edit its content, press the ⎋ Escape key to stop editing, and use the *Tab or Return* keys to navigate from cell to cell. Hold the ⌘ Command key to activate a link in a cell.

If you import tab or comma-delimited files, e.g., CSV or TSV files, they will be imported and displayed as sheets. Sheets can also be created via *Data > New > Sheet*. You will just need to provide starting column headings, which you can certainly add or take away from later.

NAVIGATION BAR

The Navigation bar displays the current record and the total number of records in the sheet. Clicking on this information opens a *Go to record* function so you can quickly jump to a specific record in the sheet. In addition, there are options to go to the first, previous, next, or last records.

EDITING BAR

To make working with sheets even more efficient, DEVONthink includes the editing bar with some basic tools:

⊟ Add a new record to the sheet.

⊟ Duplicate the current or selected records.

⊟ Delete a new record from the sheet.

⊟ Add a new column to the sheet.

☞ Displays the Column Editor to allow editing and managing the columns.

⊟ Delete a column from the sheet.

In *Text Alternative*, there is one more option in the editing bar: *Delete Selected Column* allows you to delete a column. Just click on the column header you want to delete, then this option is enabled.

CONTEXT MENU

There are a few sheet-specific context menu items available when you're Control-clicking in a sheet.

- **Cut/Copy/Paste:** Cuts, copies, or pastes whole records in a sheet. Use them, for example, to duplicate records. Pasting always pastes as the last record in the sheet.
- **Delete Records/Columns:** Deletes the selected record(s) or column(s).
- **Edit Columns:** Displays the *Column Editor* to allow editing and managing the columns.
- **New Column:** Creates a new column in the sheet.
- **New Record:** Creates a new record in the sheet.
- **Duplicate Record:** Duplicates a selected record in the sheet.

Note: Despite any visual or behavior similarities with Microsoft Excel, sheets are not spreadsheets and therefore do not provide functions and formulae.

ITEM LINKING

Sheets currently support no alternate item links.

IMAGES, AUDIO, AND VIDEO
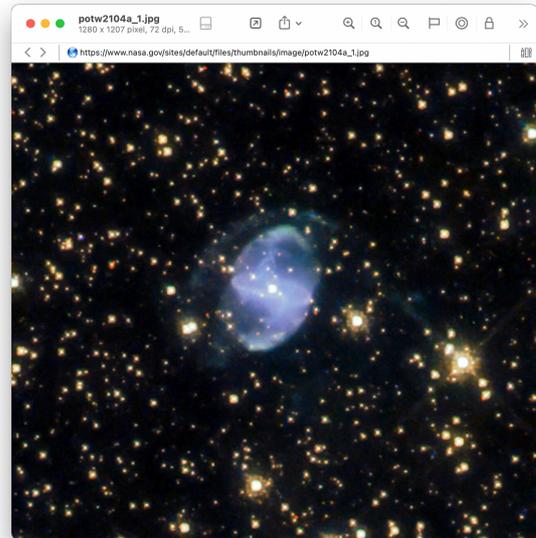
DEVONthink uses macOS core technologies to display images and videos, and also play audio. Interacting with images uses the same controls you are used to, like pinch to zoom in and out, two-finger tap to zoom to width, and even two-finger rotation in 90 degree increments. Audio and video files display the familiar macOS controls.

Images, audio, and video files can be imported. Also in DEVONthink's *Sorter* you can capture the screen to an image, as well as record audio and video notes.

EDIT PANEL

When working with images, double-clicking opens an edit panel with three tabs. The *Adjust* tab allows you to do some basic image editing, like adjust exposure, saturation,

adding a sepia tone, etc. The *Effects* tab provides some simple pre-defined image effects. The *Details* tab displays metadata about the image, including [EXIF metadata](#) and a map of the geolocated origin of the file.

NAVIGATION BAR

For audio and video files, there is a special option available in the navigation bar: the playback time. This displays the current time of playback (audio and video only). Also, if you click the time it shows a *Go to time* function so you can quickly jump to another time in the playback.

CONTEXT MENU

There are a few media-specific context menu items available, excluding common ones related to magnifying the image. In addition to the standard controls, e.g., volume, playback position, etc., some of the same context menu options are found in the action menu for these files.

- **Rotate Left/Right:** Rotate the image left and right. The image is saved in an uncompressed TIFF format.
- **Flip Horizontal/Vertical:** Flip the image on the chosen axis. The image is saved in the lossless TIFF format.
- **Edit:** Opens the *Edit* panel.
- **Copy Image:** Copies the image or current video frame to the clipboard. When used with an image, an uncompressed TIFF file will be captured.
- **Set As Thumbnail:** Makes the current frame the thumbnail of the video (only available when the video is not playing).

> Note: Edits to or copying an image via context menu items produces an uncompressed TIFF file. These files can be quite sizable, but are also saved in a lossless format.

ITEM LINKING

In addition to the document's standard item link, audio and video files support this alternative item link:

- **Frame Link:** Link to the current time of paused media.

Alternate item links may be available in the context menu in the view/edit pane or via the Action menu (gear icon) while the media is paused. The alternative command is also accessible while holding the *Shift* key while viewing the *Edit* menu.

> Note: We sometimes get inquiries about including entire photo libraries in DEVONthink, e.g., from Photos, Lightroom, etc. While it's certainly possible to include images in your databases, please understand DEVONthink is not a digital asset management application. If you want to include some images on a per project basis, perhaps for journaling or genealogy, etc., that works fine. If you are trying to have an image archive, searchable by media-specific metadata, you'll be better off using an application built for this specific purpose.

OFFICE DOCUMENTS, EMAIL, AND OTHERS

DEVONthink is the central hub for many environments, from home to office, and you are likely using several other applications along side it. As often mentioned, DEVONthink supports importing many file types; some editable, some not. If a format is text-based, like XML files, they may be directly editable. But even if a file is not editable, it may be searchable. This section is obviously not exhaustive in what kind of files can be added to DEVONthink, but if you have a format we haven't discussed, the easiest thing to do is just try importing it. Any failures will be reported in Window > Log.

EPUB

EPUB files (`.epub`) are a popular format, commonly used for digital books (including our manual). While they can't be edited in DEVONthink, their contents are fully indexed and searchable, making them a viable resource in your databases.

Navigate an EPUB file in the *Content > Table of Contents* inspector or choose the *View > Document Display > Text Alternative* view. When searching an EPUB file, the view/edit pane will switch automatically to the Text Alternative view to display the search hits.

OFFICE DOCUMENTS

Word processing, spreadsheet, and presentation applications are common in many situations. When using the proprietary formats from these applications, like Microsoft Word documents (`.doc`, `.docx`) instead of rich text files, these formats aren't directly editable in DEVONthink. However, it does support importing and indexing these particular document types:

- Apple Pages, Numbers, and Keynote from Apple's iWork suite
- Word, Excel, and PowerPoint from Microsoft's Microsoft Office suite.
- Files from supporting applications, like the OpenOffice or LibreOffice suites.
- Files from the popular macOS Mellel word processor.

These formats can only be imported, however it is possible to add template files of these formats. For example, you may have a boilerplate Pages document you often use. This could be added as a template to quickly add to your database, then opened and edited in Pages. See the appendix for a bit more information.

EMAIL

Imported email messages have their contents indexed (excluding the contents of attachments). This makes them searchable and a valuable asset, whether you're archiving email for personal or professional reasons.

TEXT AND BEST ALTERNATIVE

For some document formats, e.g., email messages or Word documents, DEVONthink only allows you to select and copy text in the *Text Alternative* view. If DEVONthink is able to interpret and convert the document format, you can use the ⊞ and ☰ buttons in the navigation bar to switch between a view that allows you to select, copy, and drag text or the Quick Look view showing a more "accurate" view of a file.

Also note you will have text-related context menu items available when you can make text selections in the *Text Alternative* view of a file.

> Note: For uneditable formats, DEVONthink uses Quick Look to display the file, provided an appropriate Quick Look plugin or application providing one is installed. If a document you want to view in DEVONthink does not show a Quick Look preview, you may need to contact the maker of the source application and ask them to add Quick Look support.

CONTEXT MENU ITEMS

Context menu items aren't available in Quick Look views, e.g., Control-clicking in a PowerPoint file. Also, when using the *Text Alternative* mode for these files, some but not all context items related to text selections are available.

ITEM LINKING

No alternate item links are available for non-native formats.

LINKED FILES

On occasion we get an inquiry about importing files with linked assets, like Adobe Illustrator or InDesign files. While it's certainly possible to import these, the links will be broken if you try to import a folder structure containing the links. Groups in DEVONthink do not exist in the file system, so the groups that are created when you import a folder structure from the Finder don't exist as real folders in the database. The files inside the folders are imported into the internal structure of the database, so their paths are not pointing to the groups in the database.

If you want to include these kinds of files in your databases, you could keep the linked files external and only import the documents. You could also index the complete folder structure containing your files into the database, leaving them where they are in the Finder. Since the paths aren't changing, the links would be preserved when you open the documents.

IN & OUT

IN THIS CHAPTER

DEVONthink is not an island. It integrates with the rest of your Mac and iOS devices in a variety of ways to make it easy for you to add data to DEVONthink. There are even some options that allow you to share your data with friends and colleagues.

IMPORTING & INDEXING

When it comes to getting data into your databases, there are two fundamental methods to consider: importing and indexing.

IMPORT

Importing copies files into the internal structure of the database. This creates a portable, self-contained database that can be moved as a single file. This is the default behavior of DEVONthink.

When you drag-and-drop files or choose *File > Import > Files and Folders*, files are copied. This does leave the originals in the Finder, which you can choose to keep or delete. But note there is no connection between the files any longer. Editing the file in the Finder after importing has no effect on the file in the database, as the database has a copy of it. If you want to access and edit the files, do so from inside DEVONthink.

If you hold the ⌘ Command key when you drag into DEVONthink, the file will be moved, not copied, into the database. If you are using *File > Import > Files and Folders*, you can click the *Options* button and enable *Move Originals to Trash*.

INDEX

Creates links to files outside the database. This allows more direct access to the files in the Finder by other applications or people. A common example is people using a cloud service like Dropbox and indexing folders in the local Dropbox folders. DEVONthink indexes the content and metadata for use with classification and other content-related functions, just as it does with imported items. Do note while indexing doesn't copy the contents of the files, the full text of text-based documents is stored. This can still take up a considerable amount of space.

Finder files and folders can be indexed using *File > Index*. You can also hold ⌥⌘ while dragging and dropping into your database.

When you do, you will see a curved arrow on the cursor while dragging, indicating the items will be indexed. Indexed items will have a small square Finder icon to the right of the item's name.

INDEXING AND THE FILESYSTEM

Indexing is not the default option for getting files into your databases. This is not only because importing creates a singular, portable database, but also due to some technical things that must be considered when indexing. Here are a few behaviors you should know and understand before indexing.

With indexing, the integration with the filesystem is very tight. When you rename a file in DEVONthink, the file's name changes in the Finder. If you rename in the Finder, the change should be automatically reflected in the database. DEVONthink tries to keep the group in the database and the folder in the Finder in the same state. Also, if you move a non-indexed file into an indexed group or create a new file in an indexed group, the file will be moved to the external indexed folder, a process we call "deconsolidation".
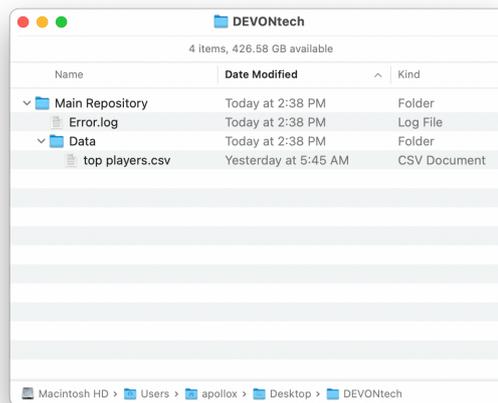
When indexing items into DEVONthink, you can index a file, a folder, or a parent folder containing subfolders. In the image shown, the "DEVONtech" folder is the parent folder and could be indexed with all its contents included. You could also index an individual folder, e.g., the "Data" folder, which would be treated as a parent folder for its contents. Or you could index individual files. Each of these options has specific behaviors you should be aware of, covered below.

Updating indexed files: In general use, DEVONthink can usually detect filesystem changes of indexed folders and will update the indexed group in the database. However, there are two things to be aware of regarding automatic updating of indexed files.

- **Files synced by other applications:** If you are indexing files in a folder synced by another application, e.g., iCloud or Dropbox, you may need to use the *File > Update Indexed Items* command to manually update the indexed group. DEVONthink does this to avoid causing a discrepancy in the data for the other application. Also, a particular process may not generate a filesystem event

for DEVONthink to detect a change has occurred.

- **Individually indexed files:** While it's certainly feasible to index individual files, be aware these files won't be updated automatically. This is due to the potential overhead of watching many individual files versus watching one folder. In this case, you can also use the _File > Update Indexed Items_ command or the file will be updated when you select it again.

> Note: If you'd like to control whether DEVONthink updates existing or deconsolidates new files, there are two hidden preferences regarding the behavior of indexing: _DisableAutomaticUpdatingOfIndexedItems_ and _DisableAutomaticDeconsolidation._

Moving Indexed Items: DEVONthink stores individually indexed items by its absolute path in the filesystem. If you move an individually indexed file or folder, it will disappear when the database updates or be reported as missing. This is because the item no longer exists in the indexed location, so the absolute path points to nothing. If you move a file or subfolder inside an indexed parent group, the change should be reflected in the database or the Finder. The parent folder still exists in the same location and DEVONthink can adjust for the changed relative paths within it.

While it's generally best to index fairly static locations, i.e., ones that you won't be relocating or renaming, sometimes it becomes necessary to do some housekeeping. Perhaps you are running low on space on the internal drive and need to move

an indexed folder to a connected external drive. Open the _Tools > Inspectors > Generic Info_ inspector, you can click the down arrow next to the _Path_ title, choose _Select_, and select the parent folder in its new location. DEVONthink should update the stored paths to point to the Finder folder and its contents in the new location.
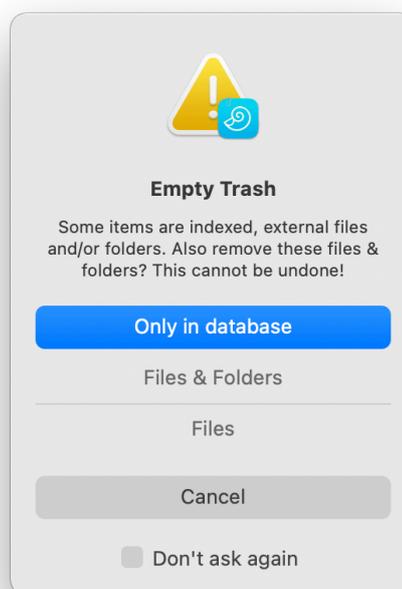
Deleting Indexed Items: When deleting indexed items, you will see one of two warnings when you empty the database's trash, depending on how you've indexed the item. With individually indexed files or an indexed parent folder, you will see the warning above prompting you to choose whether to delete the item from the file system or just the reference in the database. In this instance, DEVONthink is prompting you to make sure you aware of the potential removal of a top level indexed item.

Empty Trash

There are some indexed items in the Trash. Do you want to remove all the items, including the indexed ones, or just the imported items?

Remove Imported Items

Remove All Items

Cancel

☐ Don't ask me again
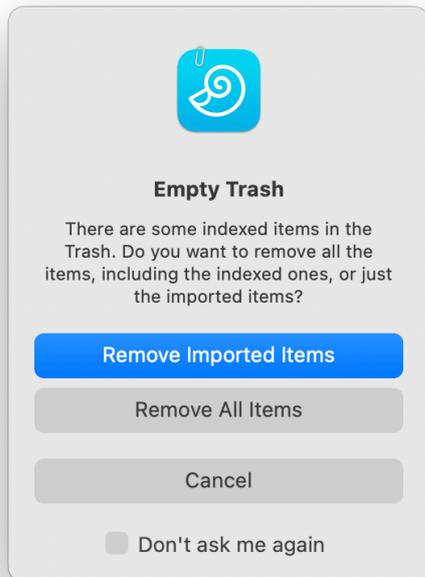
If you delete a subgroup or file in an indexed group and empty the database's trash, you will be shown the a warning there are indexed items detected in the trash. You can choose to *Remove Imported Items* which will not delete indexed files. Choose *Remove All Items* to remove both indexed and imported files when emptying the trash. Indexed files will be moved to the system trash from their location in the Finder. In this situation, DEVONthink is modifying the content of the indexed parent to ensure both the Finder and database's contents match.

Duplicating Indexed Items: When you duplicate an indexed item, the behavior depends on if you're duplicating with a database or across databases. if you duplicate the item in the same database, a copy will be created in the Finder in anticipation of potential changes. If you duplicate the item into another database, no copy will be created in the Finder. However, changes made to the item - in either

database - will affect both databases as the indexed item is pointing at the same item in the Finder.

> Note: While you cannot replicate files across database, the duplication of an indexed file across databases can provide you with a similar behavior. However, the files will not be marked as duplicates since duplicates are not detected across databases.

Replicating Indexed Files: Replicating indexed files within a database, individually or within parent folders, has no effect on the files in the Finder. Replicating only adds a record of another instance of the file. However, if you delete a replicant of an indexed file and empty the database's trash, this will have no effect on the files in the Finder. They will remain intact.

Indexing Cloud-synced Folders: One of the common uses of indexing is to keep a local folder in a cloud-synced location, e.g., Dropbox, and have access to the files within DEVONthink. While this is certainly supported, be aware that changes made to the local folder, especially when the cloud service syncs changes to the local folder, the changes may not always be detected by DEVONthink. In that instance, you can manually update the indexed group by selecting and hoisting it via the disclosure triangle or choosing the *File > Update Indexed Items* command. Also, you should only index local data, e.g., on the local hard drive or connected drives. DEVONthink doesn't support indexing data that resides only in the cloud.

Lastly, if you are indexing content and want to sync the databases between devices, please review the Indexing and Sync section.

Due to the flexibility of DEVONthink, it's possible to have a database containing both imported and indexed files.

> Note: While DEVONthink can handle large amounts of data, it is inadvisable to import or index uncurated data, like entire hard drives or your Home directory. You should be judicious in what you put into your databases.

DRAG & DROP

The Mac has always been an an environment with rich drag-and-drop support. DEVONthink is a well-behaved citizen in this regard. Here are some ideas:

IN

The easiest way to add data to DEVONthink, other than creating the documents directly inside the application, is to drag files or selected data, e.g., text, images, etc., into a DEVONthink window.

- Drag files from the Finder into a database. Holding certain command keys will allow you to copy, move, or index them. See also p. 53ff
- Drag files from the Finder to DEVONthink's dock icon. Files will be sent to the default destination.
- With applications supporting drag-and-drop, you can drag data between them and DEVONthink. For example, you can drag messages from Apple Mail into your database or DEVONthink's dock icon.

- Inside DEVONthink, you may be able to drag content from a file into the database. If you have an email message with an attachment imported into your database, you can drag the attachment out as a separate file.
- With some file types it's possible to select text and drag it out to create a new file. DEVONthink will attempt to create the most appropriate file type.

> Note: With the last two options, you may be able to drag-and-drop content between files.

OUT

DEVONthink isn't just a receiver; it also allows drag-and-drop of its files too.

- For email applications lacking good automation support, drag a document onto its dock icon or into a draft email to attach it.
- Drag documents or groups to the Finder as a quick export option. When you do this, DEVONthink will apply tags you've added to the documents also to the exported files as Finder tags.
- If you need to upload a document to a website, drag the document in the database to the page or the upload sheet, if the site requires it. Note that groups can't be added this way. You'd need to drag the group to the Finder first, then to the site.

INSIDE

And obviously DEVONthink allows dragging database items inside itself for reorganization.

- **Dragging:** *Moves* items, by default.
- **Option-Dragging:** *Duplicates* items to the dropped location.
- **Option-Command-Dragging:** *Replicates* items to the dropped location. Note you cannot replicate a file to the same location as the dragged file.

SORTER

The *Sorter* is a multi-purpose utility built into DEVONthink providing options for adding files and creating various types of notes. When enabled in Settings > Sorter, it is found in the menubar at the top of your screen — displayed as *DEVONthink* or the ⊘ nautilus icon — or docked to the side of your window. Details about the views and controls of the *Sorter* are covered in the Sorter section of the Windows chapter.
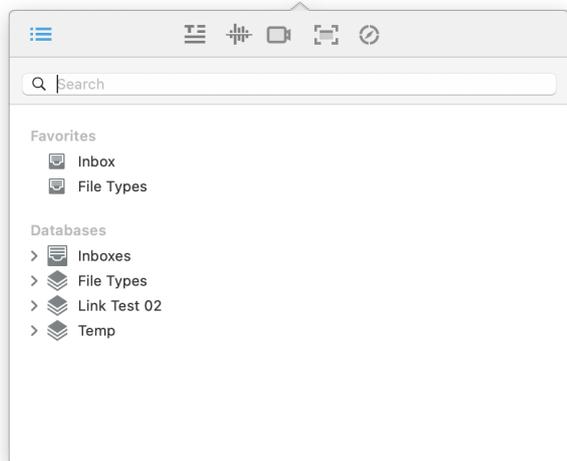
The first view of the *Sorter* is the *Navigation* view. Access your favorites, or browse and search for groups in the open databases. Double-clicking a found group will open it in a new DEVONthink window. Drag and drop files on the *Sorter* to quickly file them in a favorited group, an inbox, or a location you've

found in a search. When docked, the *Sorter* will lock open during a search so you can easily drop files into the desired location.

The *Sorter*'s other views allow for quick and easy note creation. It supports these note types:

- **Take Note:** Create text notes in plain or rich text, Markdown, or formatted note formats.
- **Voice Note:** Record an audio note.
- **Video Note:** Record a video note with the built-in camera.
- **Screen Capture:** Snap screen captures with the option of adding metadata, e.g., tags, rating, etc. directly into DEVONthink.

The *Sorter* allows you to clip web content as well. It also functions as the interface to the *Clip to DEVONthink* browser extension.

- Clip content from the current page in your default web browser.
- Clip content from a URL detected on your clipboard.
- Clip content via *Clip to DEVONthink* or enter information and a URL manually, if desired.

All these methods give you the option of capturing the content in a variety of formats, with or without extra metadata, directly into your DEVONthink databases.

ARCHIVING EMAIL

Email is an important item in many situations, both professional and personal. DEVONthink allows you to import email messages directly from supported email

applications. It also allows you to import UNIX mailboxes (`.mbox` files) that can be exported from some other email clients.

The imported email messages are saved in their original file format (`.eml`) and are displayed using QuickLook or as an alternative text view. See also p. 157ff Additionally, metadata, e.g., from MailTags may also be preserved. In addition, the "read" and "flagged" status of email messages are transferred from Microsoft Entourage and Microsoft Outlook independently from your settings in *Settings > Files > Emails*.
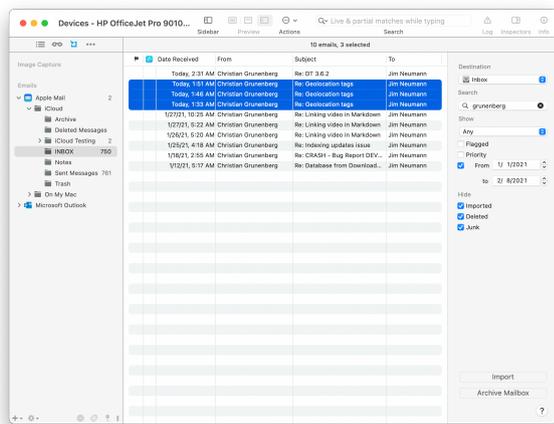
The Import sidebar: One method for importing your emails into DEVONthink is to use its *View > Import* sidebar. In the *Emails* mailboxes from these email applications can be accessed: Apple Mail, Microsoft Entourage, or Microsoft Outlook. You can read more about the controls and functions of this view in the *Sidebar: Email* section of this document.

Apple Mail plugin: If you are using macOS 11 Big Sur through 13 Ventura, there is a plugin for Apple Mail that creates a direct link between Mail and DEVONthink. It adds an *Add to DEVONthink 3* command to the

Mailbox and *Message* menus of Apple Mail. If the plugin is not automatically installed select DEVONthink > Install Add-Ons to install it. The go into Mail's *Settings > General > Manage Plug-Ins* and enable it. Unfortunately, Apple deprecated Apple Mail plugins in macOS 14 Sonoma and later.

Importing UNIX Mailboxes: UNIX mailboxes (`.mbox` files) exported from some email applications, e.g., Thunderbird or Postbox, can be imported into your database. There is no mailbox structure in these exported files so multiple mailboxes have to be exported and imported separately. They can be imported into DEVONthink in one of two ways:

- **File > Import:** Use File > Import > UNIX Mailboxes, then select the `.mbox` file in the *Open* dialog and press *Open*. This will import the messages into a group in the current location.
- **Drag and Drop:** Drag and drop the `.mbox` file onto DEVONthink's dock icon to import the messages into your database.

Other options: If you're running a more modern version of macOS or not using Apple Mail, there are some other ways for you to get emails into DEVONthink. Bear in mind, the possibilities depend on the what your email application supports, e.g., scripting. Here are some potential options:

- **Drag and drop:** Drag to the Finder then into DEVONthink, into the *Sorter*, into the *Global Inbox*, or directly into a database.
- **Mail Scripts:** Run AppleScripts from the global Scripts menu in the menubar when

in scriptable email clients, e.g., Apple Mail. See also p. 214ff

- **Mail Rule Scripts:** Apple Mail rules support running AppleScripts in their mail rules. We have provided a few for you to use or modify. See also p. 213ff

IMPORT OR ARCHIVE

When it comes to archiving email, the question arises: "Do I use import or archive?" Here's the simple way to understand it:

- **Import Email:** While *Import* can be used on a mailbox, it is generally used on selected, individual emails. This is especially useful when using a filtered view, e.g., filtering by a date range or recipient. You'd select those files and use the *Import* option.
- **Archive Mailbox:** As the name implies, this command can only be used on selected mailboxes. The mailbox will be imported into a special *Emails* group. DEVONthink will attempt to preserve the mailbox structure shown in the email application. This is very useful for archiving a mailbox and keeping it up to date. Since previously imported emails are excluded from the mailbox view, subsequent visits to the Import sidebar will only show newly received emails. Using the *Archive Mailbox* option will import only those new emails into the existing *Emails* group in the database.

Depending on the settings in Settings > Files > Emails > Conversations, DEVONthink can attempt to import complete conversations and optionally group them.

Note: Email threading is not an exact process. There has also been no standard defining relationships between messages for a very long time. DEVONthink will attempt to thread the conversations, but cannot guarantee all related emails will be detected.

PROBLEMS IMPORTING OR MOVING EMAILS

Briefly discussed in the Appendix, the UUID is a value given to each item in DEVONthink. It is unique to each item and more than one item can't have the same UUID. When email messages are imported, they are given such an identifier based on metadata from the actual email. This means you can't import the same message into a database more than once, as that would result in more than one file having the same UUID. This will be shown in DEVONthink's Window > Log. It can also cause issues when moving messages between databases. If you already imported messages into a database and forgot you did, trying to move the same email into it will fail.

In Settings > Email you can enable *Previously imported will become replicants* to import the messages into the same database as replicants. However, this still will not allow moving messages into databases already containing those emails.

REPLYING AND SENDING

To reply to an archived email message, Control-click it in the item list and choose *Send Reply*. A draft message will be composed in your default email application.

Choose *Send by Email* to email a selected document from the item list.

Note: The inter-application communication capabilities of the email client you are using determine how well these two commands work. If the commands aren't producing the expected results, check with the developer about what kind of interactions they allow between applications.

SYNC
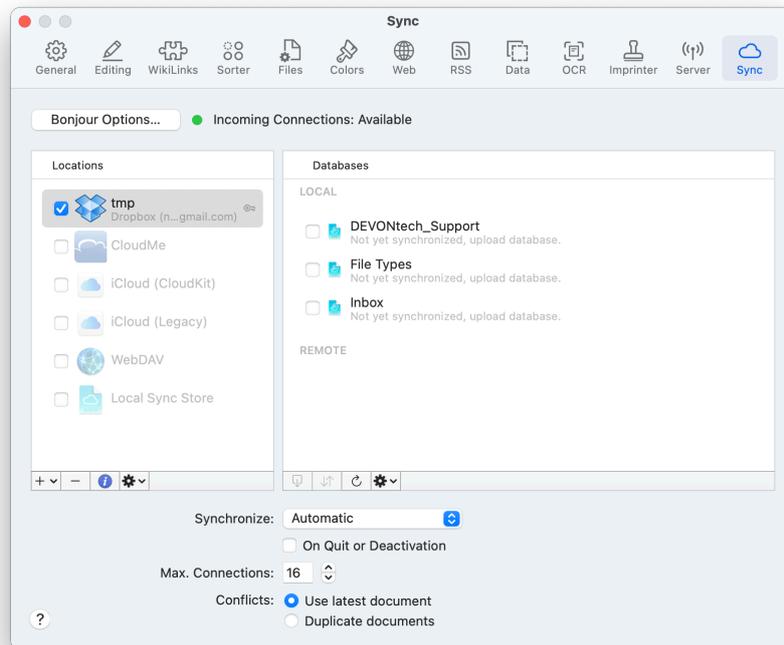
Before we discuss particular details of sync methods, take a moment to check out the Settings > Sync section. This gives you an overview of the preference pane where syncs are set up. Additionally, you will find a short glossary of sync-related terminology in the Appendix.

SYNC SIMPLIFIED

Sync is an incredibly simple concept. You have a database on one machine. You want that database on another machine. From the machine with the database, you upload the database to a sync location accessible from both machines. On the machine without the database, you'd access the same sync location and import the database. This way, every device, Mac or mobile, has a local copy

of a database. Changes are made locally then synced through the sync location to the connected devices.

The only variations are:

- If the second machine already has a opened copy of the database, you will have the option to merge with the sync data in the sync location.
- Using a Bonjour sync, in which you'd import and sync directly between devices.

That's it. Every sync is conceptually the same. The differences you find are the requirements of the particular sync method, e.g., Dropbox, and are covered below. Bonjour and local sync stores show a few more specific (but simple) steps, but they all follow the same essential pattern shown here:

- Enable a location (with or without an encryption key).
- Upload a database to the sync location.
- Enable the same location in DEVONthink on another Mac or DEVONthink To Go in iOS (using the same encryption key, only if specified).
- Import from or merge a database to the sync location.
- Repeat as needed.

BASICS AND HOW TO

This sync section isn't long because it's complicated; it's long because of the variety of options available. While the basics of sync are very simple, questions will arise and there are details to be covered. Below we answer some common questions, then describe specifics per sync method.

What is a sync store?: A sync store is a folder on a server or service (the 'sync location') that DEVONthink uses to store sync data for your syncing databases. Give it a name made only of alphanumeric characters. A concatenated name, e.g., `Research_01` can be used. Note this folder is only for use by our sync engine.

What is a 'copy of the database'?: One detail to understand about syncing: Only true copies of a database will sync together. Two databases having the same name but created independently are not the same database. These databases will never sync together. This is also why you shouldn't create a database on the receiving machine, hoping to "fill it up" with data from the source database.

If you copy the database (`.dtBase2` file) between machines, that is clearly a true copy of the database. Also, importing a database via sync logically yields a true copy of the database. True copies are databases that have the same internal identifier (UUID).

What is an encryption key?: Regarding the privacy of your synced data, all sync methods allow you to specify an optional (but recommended) encryption key for a sync location. The key is an alphanumeric string of your choice and length. This key is used to "scramble" or "descramble" the sync data using AES-256 encryption and the data is stored in an encrypted state. All databases synced to a location using an encryption key will sync encrypted data. If you specify a key when syncing, you must use the same encryption key when setting up the same sync location on other devices running DEVONthink or DEVONthink To Go.

> Note: Bonjour syncs don't allow you to explicitly specify a key, but the sync data is encrypted by default.

Can I encrypt after I've already synced?: It is not possible to simply add an encryption key after syncing as DEVONthink cannot encrypt already synced data. Indeed, if you add, remove, or modify an encryption key post-sync, you will see *Invalid encryption key* warnings in the *Log* window. In order to switch to an encrypted sync, you'll need to clean the sync location first. Control-click the sync location and choose *Clean Location*. After the clean has been successfully reported in the Log window, Control-click the sync location again, modify the encryption key as desired, then enable databases to sync

again. However, remember that changing or removing the key will require making that change in DEVONthink or DEVONthink To Go if they are syncing with the same sync location.

What are the Local and Remote sections for?: As noted above, a database must be local to the machine so it must either be open in DEVONthink or imported from the sync location. For a non-Bonjour sync location, *Local* section of the Databases list displays all local open databases. For a Bonjour location, the Local section displays databases that are open both on the local machine and the Bonjour server machine. The *Remote* section displays any databases that aren't open locally or those that have never been imported to the local machine. You cannot sync to a remote database. It must be imported locally, then you sync the local copy.

How quickly will it sync?: DEVONthink's sync does not run constantly. To balance performance and reduce unnecessary network noise, it syncs on an interval. While the interval can vary by sync method, a good standard to consider is: sync will initiate up to 45 seconds after a change is saved in a database and every 4.5 minutes of idle time when set to *Automatic*. You can set a different interval, noting a longer interval, e.g., *Hourly*, can help lessen the resource load.

Another consideration with a remote sync is the quality of the network and server responses. If your network is slow or poor quality or the remote servers are slow, not responding quickly, or bandwidth is being throttled, the speed of the sync will be affected. Syncs on your local network, e.g., Bonjour, are much less likely to be affected.

INDEXING AND SYNC

Often people index content from the local repository of a cloud service like Dropbox. The question then arises: "If I have my data on Dropbox' servers and I sync to Dropbox via DEVONthink, aren't I just using twice the space?" The answer is practically, yes. In the *Show Info* for a sync location in Settings > Sync there is an option *Synchronize contents of indexed items*. Unchecking this will sync only the metadata for the files, not the contents. However, you should only disable this option if:

- You are syncing another Mac, linked to your Dropbox account, and having the local Dropbox folder in the same relative location. The default location is `~/Dropbox`. If the locations are different, the files will appear as missing on the second Mac.
- You are not syncing with our mobile application, DEVONthink To Go. DEVONthink To Go does not support indexed items. Also, if you are using the *Download Files: On demand* option in DEVONthink To Go, you could never download the contents since the contents are not present in the sync location.

For the most flexibility, it is advisable to ensure you have enough storage space for syncing.
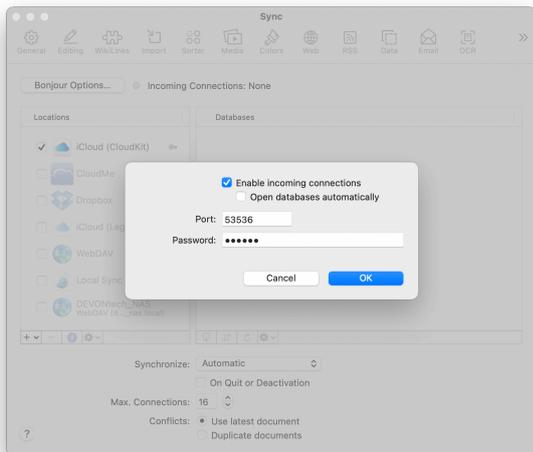
BONJOUR

(also called a direct connection) is technology you are almost certainly already acquainted with. If you have a wireless printer or scanner and notice how your Macs and mobile devices can see those devices by name with no setup by you, they are using Bonjour. Bonjour is a way for devices, or services like DEVONthink's sync, to broadcast its presence on a network without requiring technical know-how by the user.

When it comes to syncing, a Bonjour sync deals directly between devices. One device acts as a server, the other a client to that server. The participating devices must be on, running DEVONthink or DEVONthink To Go, and on the same network. There is no intermediary location where data is stored. This is much faster than uploading all data to some server on the internet and downloading it again on another device. But, when you leave your office and you haven't synchronized your databases, you'll need to wait until you come back another day.

> Note: Bonjour does not function over VPNs. This is a technical limitation of the technology, not DEVONthink.

Bonjour Setup:

- **Step 1:** On the machine acting as the server, open Settings > Sync and press the *Bonjour Options* button.
- **Step 2:** Click *Enable Incoming Connections* to use this Mac as a Bonjour server of its databases. Optionally, have closed databases open when a client initiates a sync.
- **Step 3:** Enter a mandatory password. This password is required for other devices to act as a client of DEVONthink's. If you are working with an IT department who has assigned a port for you, or you have a port you'd specifically like to use, enter it in the *Port* field. Otherwise, leave this blank and DEVONthink will assign one for you.

The Mac with Bonjour enabled should now be visible as a sync location to other devices on your local network. On the other devices, enable it, enter the password, and you can import databases or sync existing databases directly with it.

> Note: You should never use more than one device as a Bonjour server for a given database.

LOCAL SYNC STORE

A local sync store is a specialized folder containing sync data on your local machine or connected drives and servers. This is a very fast and reliable sync method for Mac-to-Mac

syncing. You can use one sync store to sync multiple databases or create more than one, e.g., one for a particular group of databases.

Setup a new local Sync store:

- **Step 1:** Open Settings > Sync and enable the *Local Sync Store* option. If you already have one created, click the + button and choose *Add Local Sync Store*.
- **Step 2:** In the sheet that appears, navigate to the location you want to save the sync store. Enter a name and an optional encryption key, if desired. Then press *Add*.
- **Step 3:** When the location is created, select it and enable the databases you want to sync in the *Databases* list on the right.

Setup an existing local sync store:

- **Step 1:** Locate the local sync store (.dtCloud) file in the Finder.
- **Step 2:** Double-click the sync store or drag and drop it into the *Locations* pane in the *Sync preferences*.
- **Step 3:** If you used an encryption key when you first synced to the existing location from another machine, select the sync location and press the Info button to open the Info popup. Enter the appropriate encryption key.
- **Step 4:** When the location is created, select it and you should see any importable databases listed in the *Remote* section of the databases list.
- **Step 5:** Double-click a database you want to import, saving it to a safe location, e.g., the `Databases` folder in your Home directory.

Note: Due to technical limitations, a local sync store currently cannot be used for Mac-to-mobile syncing. iOS doesn't have the ability to mount file servers.

ICLOUD (LEGACY)
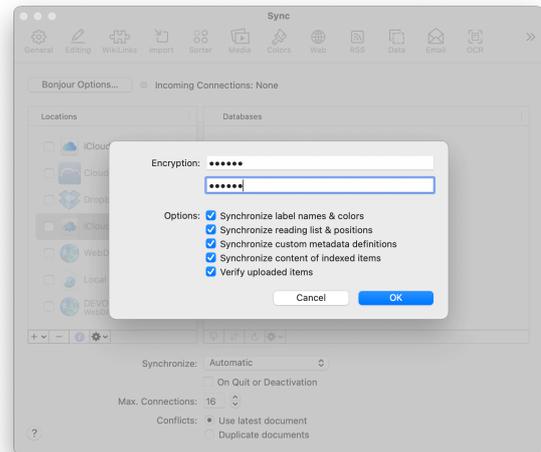
As most Apple devices are logged into your Apple ID, iCloud is the simplest method to set up and sync with. Since it's logged into your personal account, it can only be used for syncing with your own devices. If you want to keep your databases in sync but not share them with others this is a great choice. We strongly recommend an iCloud plan with enough storage. Here are the simple instructions to set it up.

iCloud Setup:
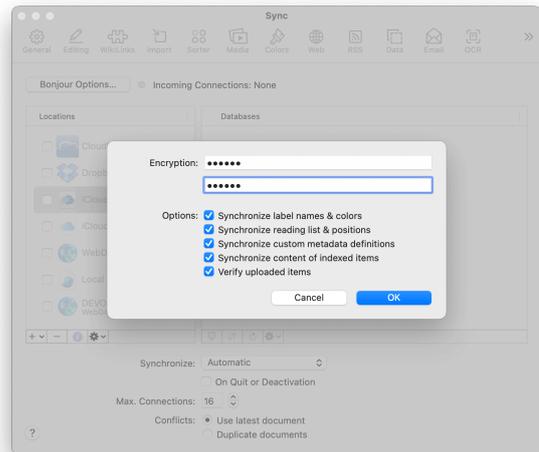
- **Step 1:** Open Settings > Sync and enable the *iCloud (Legacy)* option.
- **Step 2:** Enter an optional encryption key, if desired. If you are already syncing to this location from another machine, you must enter the same key you used. Leave it blank if you didn't use an encryption key.
- **Step 3:** Select the sync location and enable the databases you want to sync in the

Databases list on the right. If you already synced from another machine, double-click a database in the *Remote* section, saving it to a safe location, e.g., `~/Databases`.

One thing to realize with iCloud syncing, the sync is done locally. After sync is finished, iCloud uploads to Apple's servers, then to devices using your Apple ID. This means databases may not be immediately available to sync on the other devices. The initial sync requires patience, as DEVONthink has no control over the speed and reliability of iCloud's process. It syncs to the iCloud folder, iCloud does the rest. See the CloudKit section below for an alternative option.

CLOUDKIT (ICLOUD)

Utilizing the same active iCloud account, the CloudKit option offers a single-stage sync with the same simple setup as the iCloud (Legacy) method. However, with this option, the sync is directly to Apple's servers. This can appear to be a bit slower than the legacy option, but once the sync is finished the files are already uploaded without having to wait for iCloud to sync on its own. This also conserves space as no sync data is temporarily stored on the local machine's hard drive. The instructions are essentially the same as setting up iCloud (Legacy). You're just choosing the CloudKit (iCloud) option instead.

CloudKit Setup:

- **Step 1:** Open Settings > Sync and enable the *CloudKit (iCloud)* option.
- **Step 2:** Enter an optional encryption key, if desired. If you are already syncing to this location from another machine, you must enter the same key you used. Leave it blank if you didn't use an encryption key.
- **Step 3:** Select the sync location and enable the databases you want to sync in the *Databases* list on the right. If you already synced from another machine, double-click a database in the *Remote* section, saving it to a safe location, e.g., `~/Databases`.

DROPBOX
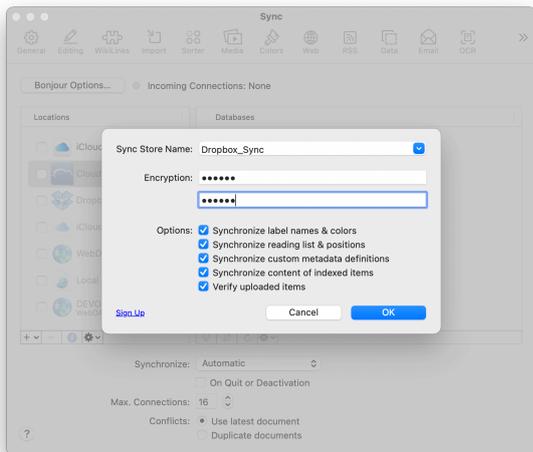
If you have a [Dropbox](#) account you can use it just like you'd use WebDAV. DEVONthink creates a private folder for its sync stores and so keeps its data separate from your photos and other documents. Of course it does not get access to anything except its own files. Dropbox and DEVONtechnologies respect your privacy.

The setup for a Dropbox sync location is essentially the same as for iCloud. However, there are two differences of which to take note:

- **Sync Store Name:** You will have to enter a *Sync Store Name*. This is where the sync data will be stored in the `Apps` folder of your Dropbox account. You can add more than one sync location, if desired.
- **Authentication:** Since the Dropbox sync connects and syncs directly with the Dropbox servers, you are required to authenticate the connection. When you first enable a Dropbox sync location in DEVONthink your default web browser will open and ask you to allow access to our sync engine. This will need to be

done on other devices you are setting up this same Dropbox sync location. Once the authentication is allowed, you subsequently can add and remove other Dropbox sync locations in DEVONthink.
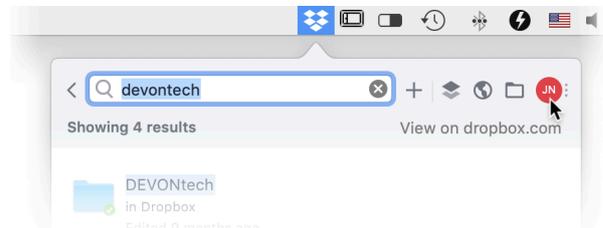
If you are using a Dropbox sync and also the Dropbox application, it is advisable to exclude the `DEVONthink Packet Sync` folder inside the `Apps` folder from being synchronized with your Mac. This keeps the Dropbox app from wasting valuable disk space and bandwidth by re-downloading all changes you've made to your databases, and from spamming you with notifications.

- **Step 1:** Click the Dropbox icon in the menubar at the top of your screen, then click the account icon and choose *Preferences*.
- **Step 2:** Select the *Sync* tab and click the *Choose folders to sync* button.
- **Step 3:** Select the `Apps` folder, and uncheck the `DEVONthink Packet Sync` folder.
- **Step 4:** Click the *Update* button and okay the removal of the local data.

Note: Due to Dropbox' API restrictions, you cannot sync between Dropbox accounts, .e.g., between yours and a colleague's account. Also it is not possible to connect DEVONthink to more than one Dropbox account at a time.

WEBDAV
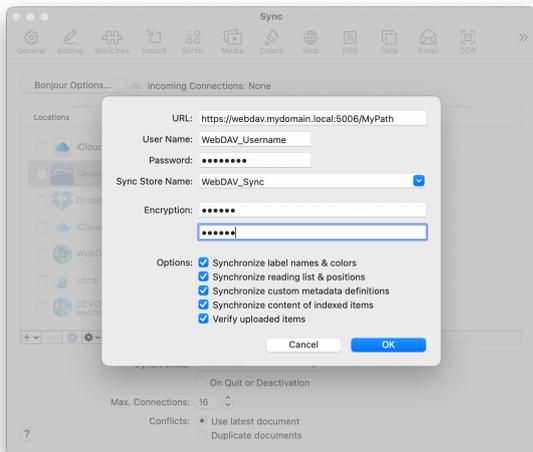
If you run your own [WebDAV](#) server, your ISP offers it as a service, or you have subscribed to an online service such as [CloudMe](#), this might be for you. Generally, if you can access the WebDAV server with Go > Connect to Server in the Finder, you should be able to connect DEVONthink to it.

Your data is stored in encrypted [sync stores](#) on the server. You can keep all your devices in sync at any time as long as you have internet access.

Setting up a WebDAV connection follows the same simple pattern and allows you to specify a sync store name. But there are a few parameters that must be entered to make the connection:

- **URL:** This is the address of the WebDAV server to which you are connecting. Make sure you use the proper protocol of `http` or `https`. Also make sure the URL is a complete path, as required by the server or service you're using.
- **Username/Password:** Enter the defined or provided username and password to allow

DEVONthink to connect to the WebDAV server.

> Note: A typical complete path would be similar to: `https://myWebDAV.com/WebDAVvolume/WebDAVFolder`. The volume and folder are generally case-sensitive. Specifying a WebDAV folder may be required if the server doesn't allow you to write to the root of the volume. Check with the manufacturer or provider.
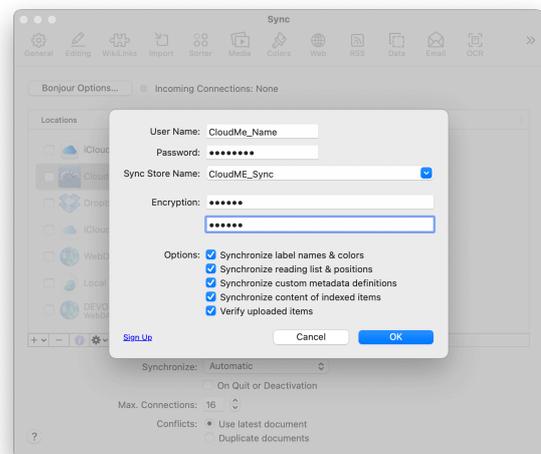
CloudMe: A European cloud service offering WebDAV services, there is a built-in template for syncing with it. Just enter the username and password you use to log into the service, enter a store name, and DEVONthink with connect with a proper WebDAV URL for you.

Other cloud services: If you are interested in other cloud services to sync with, services offering WebDAV connections should be supported. Check the [FAQ](#) or [Support](#) pages to see if it's supported.

Rolling your own: It is possible to run a WebDAV server on your own. Some NAS drives, e.g., Synology, have WebDAV capabilities and you can run a WebDAV server by repurposing an older Mac. Even some

more full-featured packages like OwnCloud or NextCloud can be set up for WebDAV services. However, these options can provide more technical challenges in setup and administration beyond the scope of our support.

> Note: With Dropbox and WebDAV connections, if you are connecting to a location you've already synced to, a list of existing sync stores is displayed in the *Sync Store Name* dropdown. This way you can quickly add the proper sync store instead of trying to remember the exact name you gave it.

Q & A

I'll just put my databases in (name your cloud service): This is not data-safe and never has been. The mechanisms used by cloud services are not compatible with package files, like our databases. Due to the number of broken databases we've seen over the years, DEVONthink will neither sync nor open databases stored in these locations. We suggest keeping them in a folder in your home folder, like `~/Databases`.

I want to access my databases from one location: Along with the previous note, this is not possible. Databases are stored locally and must be imported to the current machine.

I want to find my files in the sync location: Your databases do not "live in the cloud". Sync does not copy your databases and files into any sync location. It transmits raw, chunked, and optionally encrypted DEVONthink-specific data, only useful to DEVONthink

and DEVONthink To Go. You cannot go into a sync location and retrieve a specific file, and neither could anyone else, friend or foe.

Should I use one sync store per database: This is either a personal choice or a requirement of your specific situation. A sync location can be used with one, several, or all databases. Multiple sync stores can be employed for different sync situations and/or different devices, e.g., to synchronize specific databases via one sync store for personal use and sync others via a second sync store for business purposes. In situations where you need to sync certain databases to certain individuals, you can use one sync store for each subset of databases.

And while this shouldn't be the first consideration, if you'd like to use one sync store per database or for a subset of them, it may lessen the time troubleshooting a sync issue with a particular database.

Can I use more than one sync method at the same time?: Indeed this is supported behavior. For example, you may want to set up a Bonjour or a local sync store for syncing on your local network and a remote sync option for syncing when you're out and about. However, if you want to sync via two cloud-synced services, e.g., Dropbox and iCloud, you should not sync the same databases via two different methods. Doing so could cause conditions where one cloud-service's sync data would be out of date, causing conflicts with syncing. Each sync location is updated independently so changes may not be received in one location before it syncs. Additionally, unnecessary duplicates might be caused, especially if the *Conflicts* setting

in *Sync* preferences is set to *Duplicate documents*. Lastly, syncing a database to multiple remote locations may waste space and bandwidth in some cases.

TROUBLESHOOTING

Generally, syncing is a transparent and reliable process. However, poor network conditions, unreliable servers, etc. may cause unexpected issues. Please refer to the Sync section of the Troubleshooting chapter for some possible fixes.

CAPTURING PAPER (IMAGE CAPTURE)

DEVONthink comes with built-in support for Image Capture compliant scanners, as well as for the Fujitsu ScanSnap.

OCR: DEVONthink optionally makes scanned documents searchable by using optical character recognition (OCR). OCR adds an invisible text layer to the scanned file that is computer-readable and searchable; a layer that is recognized by DEVONthink's AI engine. OCR on scans is generally enabled by default. For best results we recommend scanning at 200 dpi in color and with 100 percent quality.

> Note: If you are using a Fujitsu ScanSnap, see the next section.

To capture paper using an Image Capture compliant scanner open the *Import* sidebar using *View > Import* or selecting the icon over the sidebar. It is divided into a sidebar and a main pane, which changes depending on your selection in the sidebar. The options in the sidebar are arranged from top to bottom according to a typical scan workflow:

Scan, check the scanned pages, arrange the pages in a document, and save them to the database.

If you are using a scanner with an automatic document feeder (ADF), you can also use a *Queue* to prepare a pile of sheets for batch processing and scan them in one go.

DEVICES
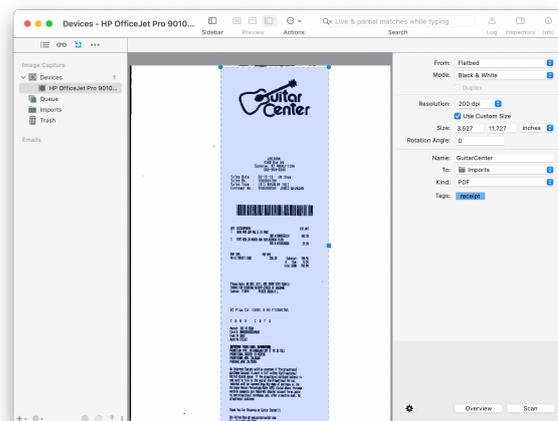
Select your connected scanner or camera in the *Devices* section of the sidebar to run a scan or download images from a connected iOS device or camera. The main pane shows an interface similar to what Apple Image Capture uses.

Choose the scan destination in the *To* pop-up menu. Either send the scan directly to any of your databases, add them as single files to the *Imports* section, or choose any binder that you have created there.

Scanners: DEVONthink generates an overview scan of the current page in the scanner, and allows you to select which parts of the page you want to capture and set the scan options. Click *Scan* to capture the page.

Cameras: DEVONthink shows the available images. Select the images you want to import, rotate them if necessary, and click *Download* or *Download All* to download the images to your computer. You can also delete images from your camera with the *Delete* button.

IMPORTS
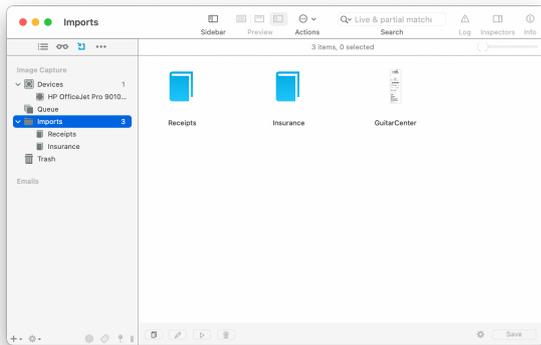
The *Imports* section contains scanned pages or binders of collected scans. Create empty binders here to which you add your scanned pages. Alternatively, use the *Create new Binder* button at the bottom of the sidebar.

Add pages by dragging them from to the desired binder, in the current view or the sidebar. Rearrange added pages if desired and set the document properties by clicking the *Properties* button. Use the *Sort* button to reverse the sort order or shuffle pages, e.g., when scanning all front pages first, then the back pages. Choose *Sort and Merge Documents* to merge two documents where one contains all the odd pages and the other all even pages.

> Note: You cannot save multi-page documents as images; therefore, *PDF* is the only option for the file type here.

TRASH

This is where you find images that you have deleted from *Scans & Images* or *Imports*. Empty the trash using the *Empty* button at the bottom of the window or right-click or Control-click images to add them to an existing or new document using the context menu.

QUEUE
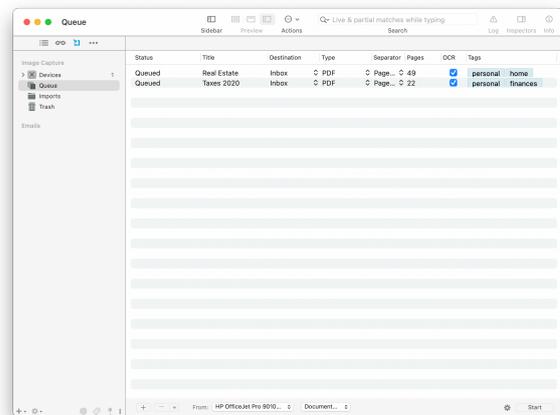
If you are using a document scanner with automatic document feeder, you can use the queue to add multiple pages or even multi-page documents to the feeder and scan them in one go.

Choose your scanner in the pop-up menu above the list. Then use the *Add* and *Delete* buttons to add or delete steps and rearrange them by dragging. Edit the fields to set a title or tags, or to change the document type or destination. Check *OCR* to convert a scan to a searchable PDF after import.

To scan a batch of paper, set the *Separator* either to *Page Count* and the number of pages in the document or to *Blank Page* to begin a new document every time a blank page is encountered.

Before starting the batch run, adjust your scan settings by clicking the *Configure* button. If you want to convert the scans to searchable PDFs, you should choose a resolution of minimum 300 dpi. Then click the *Start* button to start scanning. Finished steps are marked as "Sent". To remove finished items from the list, select the ones to remove and press the minus button at the bottom of the window. Alternatively, click the dropdown button and choose *Remove Sent* or *Remove All*.

CAPTURING PAPER (OTHER OPTIONS)

DEVONthink works with the Fujitsu ScanSnap, ExactCode ExactScan, and other scanners that are not directly supported.

In addition, you can add already scanned pages to your DEVONthink database and manually convert them to searchable PDFs.

USING A SCANSNAP SCANNER

DEVONthink recognizes scans sent to it from the Fujitsu ScanSnap Home application or the older ScanSnap Manager software. To send scans automatically to your databases, simply add DEVONthink to ScanSnap Home or ScanSnap Manager as the application to use for opening completed scans. The scanner app will send the created PDFs to DEVONthink which in turn will import the document. The files will be imported into the Global Inbox or a selected location, depending on the option set in *Settings > Import > Destination*.

ScanSnap's scanning software can provide already OCR'd PDFs. However, if you don't enable this option, DEVONthink can perform the OCR on the incoming scans if you've enabled Settings > OCR > Convert Incoming Scans.

USING AN UNSUPPORTED SCANNER

You can also capture paper using an unsupported scanner and import the finished scans into DEVONthink. To do this, use the scan application that came with your scanner or a third-party scan application. Check the scan application's preferences and look out for an option that allows you to open the finished scan with another application, e.g., an image editor. Change the default application for the scan to DEVONthink.

DEVONthink knows the identifiers of many scan applications and will convert the incoming scan to a searchable PDF if possible. If DEVONthink does not recognize your scan application, please create a Zip archive of the application and send it to us so that we can add its identifier to a future release of DEVONthink.

> Note: In the settings for the scanning application you're using, it is best to leave the default location for the output path, often `~/Pictures`. Do *not* set the path to DEVONthink's *Global Inbox*, as this can lead to errors when DEVONthink tries to import a scan that is not completed yet.

IMPORTING EXISTING FILES WITH OCR

If you already have an archive of documents that have been scanned without OCR, or if you cannot use the capture function for whatever reason, you can import image files while applying OCR.

To import an image file while applying OCR, choose *File > Import > Image with OCR*. Click the *Options* button to choose the output format and whether to send the original to the system trash after importing. The image will be processed with DEVONthink's OCR engine and be imported to the database in the format chosen. If you have enabled *Searchable PDF: Set metadata after text recognition* in the *OCR* preferences, DEVONthink will show the metadata entry window when the OCR process is completed (before the file is actually imported to the database).

The date of the created document is set to the date of the original file. Thus, for archival purposes, the searchable document is identical to the original one. The modification date is set to the current date and time to reflect the addition of the searchable text layer. If you're importing a PDF, any keywords in the original file are retained and used as tags.

EXTENSIONS AND BOOKMARKLETS

DEVONthink provides a sharing extension (requires OS X Yosemite or later), a web browser extension, as well as bookmarklets, for conveniently clipping information from other applications into your DEVONthink database.

SHARING EXTENSIONS

Sharing extensions let you "share" data with other applications, Airdrop, etc. Extensions are mainly intended for the sandboxed App Store environment where applications can no longer easily communicate with each other. When you access the *Share* menu in a compatible application, you should see an option, *Add to DEVONthink* that allows you to send data from the application to DEVONthink.

Installation: Just as other sharing extensions are installed, open *System Settings > Extensions > Share Menu* and enable the option for DEVONthink. It should now be available in any sharing-enabled application's *Share* menu.

> Note: The data being sent is controlled by the sending application, not DEVONthink. If there are issues with the data received in your database, please contact the developer of the application to report your findings.

BROWSER EXTENSIONS

Browser extensions add functionality to your favorite web browser. DEVONthink's *Clip to DEVONthink* extension usually appears as a ✆ nautilus icon in the web browser's toolbar. When clicked, the *Clip to DEVONthink* will identify data about the current page in the browser and open the Web Clip section of the *Sorter*. Here you can simply select the location to clip the content or add optional metadata, like tags, label color, etc.

Installing: The *Clip to DEVONthink* for Safari extension is installed by DEVONthink by default. The extensions for Firefox and Chrome can be installed from our [Extras](#) download page. You can also access these pages via the [DEVONthink > Install Add-Ons](#) panel.

> Note: While there is no direct support for other browsers, some allow you to install Chrome extensions. This may allow you to install our browser extension in those browsers as well.

BOOKMARKLETS

Similar in function to a browser extension, but much simpler, bookmarklets are special bookmarks that execute some JavaScript to capture the current page or selection in the browser. To use one of the bookmarklets, load the page you wish to archive or clip text from in your web browser. When the page is fully shown, select the bookmarklet in your *bookmarks bar*. Instead of loading another page as normal bookmarks do, the bookmarklet adds the selected text or the whole page as text, bookmark, HTML code, web archive, or PDF to DEVONthink's default destination.

Installing: Bookmarklets can be installed from our [Extras](#) download page. Typically, the bookmarklet can just be dragged and dropped to the browser's bookmarks toolbar. However, you may need to Control-click the bookmarklet and copy the code to add it manually, if the browser requires it. We have provided separate bookmarklets, one for each type, currently supporting

capturing: bookmark, web archive, HTML, PDF (paginated or single page), plain text, or the selection as plain text.

> Note: Due to increased security in macOS, Apple Safari will prompt you to allow launching DEVONthink when using the browser extension or bookmarklets. Other browsers allow you to make a persistent choice about this behavior.

WEB SHARING

DEVONthink allows you to give others on the local network access to your databases using a standard web browser on any operating system (including Windows and Linux). The embedded web server provides an interactive web interface that allows defined users to interact with the shared databases. Here are the first steps to getting started using this powerful feature.
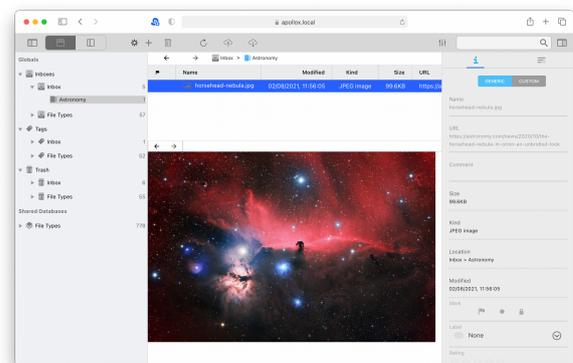
SECURING YOUR SHARED DATABASES

Before you start sharing your data it's a good idea to check the security settings.

To enhance the security for the databases you broadcast, you define users and give them per-database permissions. You will also set a certificate for the server, so the

connecting users can validate they are connecting to a safe server. These items are set in _Settings > Server_. Users will only be able to interact with the databases based on the permissions you give them, including disallowing them even to see certain databases.

> Note: Depending on the certificate settings specified in the preferences, a warning about an invalid certificate may be shown when users access the web sharing. This is especially true when using a self-signed certificate. While this warning is something to be suspicious of when browsing in general, you and your users can accept it in this case.

SHARING A DATABASE

Start and stop the server: Once the certificate and users have been set up to your liking, press the _Start_ button to start the server. You can also select the _Tools > Start Server_ command or choose the _Start Server_ option in DEVONthink's dock icon. If the server is running, these will display _Stop_ instead.

Share your server's address: Once the web server is started, you will see links at the bottom of the preference pane. These are the active links you will share to individuals you have defined as users. One option is to Control-click the link, select _Share_ from the context menu, and share it via your preferred method. You can also use _Copy Link_ and paste it where you need to. Lastly, you can click and drag the link directly to many applications, like Apple Messages.

The person who receives your link will open the page, login with the username and mandatory password you've defined for them, and have access to the databases you want them to see. If you have specified a port in the preferences, your users may be able to add a bookmark to their browser for quick access.

> Note: We believe in data privacy and hope you do too. Browsers may present options to save login credentials. Some may even save the credentials by default. We are cautious of the first and not a fan of the second. If the user is on a shared computer, consider what access other users could have if using these options to save credentials.

USING THE WEB INTERFACE

The interactive web interface imitates the look-and-feel of DEVONthink in many ways, but in a condensed form. Contrary to a static web site, it only loads once; clicking buttons or links does not reload the whole page but dynamically updates it. This also means you should use the _Back_ and _Forward_ controls in the user interface instead of the ones in your browser's toolbar.

Similar to the DEVONthink, the web interface is divided into panes: toolbar, sidebar, item list, and view/edit pane. But note some operations, e.g., deleting or organizing items, are dependent on the permissions you've been given for the specific databases.

Sidebar: The sidebar is where you can navigate the databases' inboxes, groups, tags, and trashes in the sidebar. You can even drag items from the item list to reorganize things.

Item List: Selecting items in the sidebar will display the contents in the item list. When using the standard preview position, the list can be sorted by clicking the column headers. There are options to enable or disable them in the context menu. Items can be dragged, handily for filing loose documents into groups. Double-click groups to display their contents in the item list. For quick navigation, press the < and > arrows to go back and forward to visited locations in the databases. You can also click the locations in the path bar above the item list to jump to a parent location.

View/Edit pane: Displayed below the item list or to the right, depending on the preview choice made in the toolbar, this pane will attempt to display the contents of the selected file. Clicking and dragging the divider bar allows you to resize the pane, relative to the item list. A select number of file types, e.g., plain text, formatted notes, and Markdown files can be viewed and edited in this pane. When the *Info* inspector is shown it will display as a pane on the right side of the view/edit pane.

> Note: Due to the limitations of browser technologies, some file types cannot be displayed.

Toolbar: Some handy options are available in the toolbar, including switching the position of the view/edit pane, adding some metadata, e.g label or rating, to a selected item, and creating groups and a few document types. It also has controls for uploading new documents and downloading currently selected ones. A user menu allows you to switch between English and German language and also provides a *Log Out* option for more security when allowing others access to the computer. Lastly, it gives you access to two powerful options: the *See Also* pane and the search field.

See Also: When you show the inspector pane, the second view is a See Also view. This displays potentially related files in the current database you are viewing.

Search: Searching the viewable databases can be done in the search field. Enter search terms, including using search prefixes to focus the searches. For example, you can do a search for `text:housing tags:government`. If you want to restrict where you're searching, select *All Databases* or a specific database to search in.

Descriptions of the controls in the user interface can be found in the Web Sharing section of the Windows chapter.

ACCESSING YOUR DATA OVER THE INTERNET

Web sharing is best used on a local area network (LAN). But there may be situations where you want to share the database to users that aren't on your network. While we can't provide specific support due to the differences in equipment and environments, we have provided a simple guide you can try.

To access your database from outside your network, you need to make your Mac "visible" to the outside world. In general, when you a using a DSL or cable modem, you are also using a router. Routers create an intranet that your Mac is connected to and "route" traffic between the internet and your personal

intranet. Now, you need to create a route from the outside leading to the Mac sharing your database. This offers a port on the outside that is directly connected to the port on which DEVONthink is publishing.

If everything goes well, you will be able to access your database using an address like: `http://xxx.xxx.xxx.xxx:port`, where `xxx.xxx.xxx.xxx` is your current public IP address. (Note: This is your router's address on the internet, not your Mac's.) Next, `port` is the outside port number leading to your published database.

Port forwarding done manually: The following is only a rough outline of the steps needed to configure port forwarding manually. The precise way to do it varies from router to router. You will need to consult the manual for your router in order to determine exactly how to set things up. To configure port forwarding, follow these steps:

- **Step 1:** Begin by determining your Mac's public IP address. This can be done by visiting a web site like https://www.whatismyip.com from your machine.
- **Step 2:** Determine the port on which DEVONthink published on your Mac. You set the port in *Settings > Server*. To publish on the internet, enter a port number here and do not let DEVONthink set it automatically as the port number may then change every time you open the application.
- **Step 3:** Determine your Mac's private IP address. The IP address is usually of the form `10.x.y.z`, `192.168.y.z` or `172.16.y.z`. You can find your Mac's private IP address by going to the *Network*

preferences panel in *System Preferences* and looking it up under *TCP/IP* for the interface you are using (usually *Built-In Ethernet* or *Wi-Fi*).

- **Step 4:** Decide on a public port for DEVONthink. The port should be in the range 1025-65500. We suggest that you use port `8080`, which is traditionally a default port for private web servers.
- **Step 5:** Configure port forwarding on your router. The steps to do this vary from router to router, but all of them require you to provide these details: Public port, private destination IP, and private destination port. You found the private destination port in step 2, and the private destination IP in step 3, and you selected the public port in step 4. If you are in doubt about how you configure your router to do port forwarding, you need to consult the manual that came with your router. It is usually done through a web-based interface or custom-built administration application. For instance, AirPort routers can be configured using the AirPort Admin Utility.
- **Step 6:** Save the configuration changes on your router, and restart the router if required. At this point, you are ready to connect to your DEVONthink from the outside.
- **Step 7:** From the remote computer, open a web browser and enter the address as follows: `http://xxx.xxx.xxx.xxx:port`, where `xxx.xxx.xxx.xxx` is the public IP address you found in step 1, and `port` the public port you selected in step 4. Press ↵ Return and you should get presented with your database's web interface.

Setting up port forwarding can be tricky, but the difficult part is mainly in determining how to configure your particular router. If you are in doubt, search online for your router's name and combine it with a search for "port forwarding" or "port mapping."

SERVICES

The *DEVONthink > Services* menu gives you access to special commands provided either by other applications, such as TextEdit or Safari, or by services extensions such as DEVONtechnologies' WordService or CalcService. Also, DEVONthink publishes its own services in the *Services* menu.
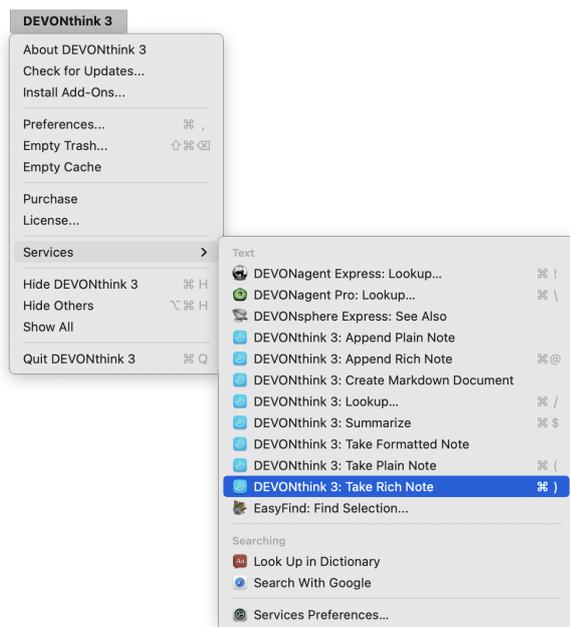
DEVONTHINK SERVICES

DEVONthink installs several services for copying or summarizing selected text, capturing a web page, or searching for documents in your databases.

- **Add to DEVONthink 3:** Adds selected files, bookmarks, or images to your database.

This service is also available in the Finder's context menu.

- **Capture Bookmark:** Adds a bookmark to a URL selected in text.
- **Add to Reading List:** Adds a bookmark to a URL selected in text to the *Reading List*.
- **Take Plain/Rich Note:** Adds selected text to the global inbox as a plain or rich text note from any application that support services. Taking a rich text note also copies images and clickable links. If the source document is a web page or a news feed, DEVONthink tries to capture the address of the page or feed as well. This only works with applications that support this feature, such as Safari, DEVONagent Pro, and other web browsers.
- **Append Plain/Rich Note:** Adds selected text as plain or rich text to the last note taken using the DEVONthink *Services* menu items.
- **Lookup:** Opens the search pane in DEVONthink with the selected text copied as search term.
- **Summarize:** Creates a new note in DEVONthink's inbox with a summary of the selected text. DEVONthink uses all documents in the open database for determining what's important and what's not. The summarization settings in *Settings > Editing*, define whether the summary are be based on sentences or paragraphs.

If you want to assign hotkeys to services, go to *System Settings > Keyboard > Keyboard Shortcuts > Services*. Do note that application hotkeys can override hotkeys set here. Try to make sure to specify unused key combinations in your shortcuts. Also, due to

the way macOS loads menus, you may need to show the *DEVONthink > Services* menu once before the hotkey will become active.

PDF SERVICES

Another way to get files into DEVONthink is using PDF services. Installing DEVONthink's service adds a *Save PDF to DEVONthink* option to the *PDF* button of the print dialog in any Mac application. This allows you to print a paginated PDF directly to your database.

To install the PDF service, select *DEVONthink > Install Add-ons* and check *PDF Services* in the dialog window. Then click *Install* and the option should now be available.

Printing to your database: To "print" (save) a document to DEVONthink as a PDF, open it in its creator application (this could even be DEVONthink itself). Then, do the following:

- Select *File > Print*.
- In the appearing print dialog window, click the *PDF* button at the lower left corner and select *Save PDF to DEVONthink* from the menu. A PDF will be printed and sent to DEVONthink. Depending on your choice in *Settings > Import > Destination*, the file import into the *Global Inbox* or let you choose the destination group.

Note: This requires an installed printer to work properly.

THIRD-PARTY APPLICATIONS

DEVONthink offers many standard ways to integrate with third-party apps including drag-and-drop of common data formats, copy-and-paste, and AppleScript. In addition DEVONthink comes with special arrangements for applications often used together with it.

- **Bookends:** Choose *File > Import > References from Bookends* to import Bookends references as rich text documents with a back link to the original item in Bookends.
- **Evernote:** Choose *File > Import > Notes from Evernote* to import selected Evernote notebooks.
- **Tinderbox:** Copy notes in Tinderbox and choose *Data > New > With Clipboard* to create plain or rich text copies of the notes in DEVONthink including backlinks and tags.
- **Yojimbo:** Choose *File > Import > Items from Yojimbo* to import all items from Yojimbo. Items without URLs are backlinked.

- **Apple Mail:** DEVONthink adds its own menu commands into Apple Mail to facilitate importing selected message or mailboxes into your databases. See also p. 58ff

WINDOWS

IN THIS CHAPTER

DEVONthink uses a number of windows to present information. These windows are used for displaying and manipulating groups and documents, finding information, editing metadata, analyzing text, and changing the properties of your database.

MAIN WINDOW
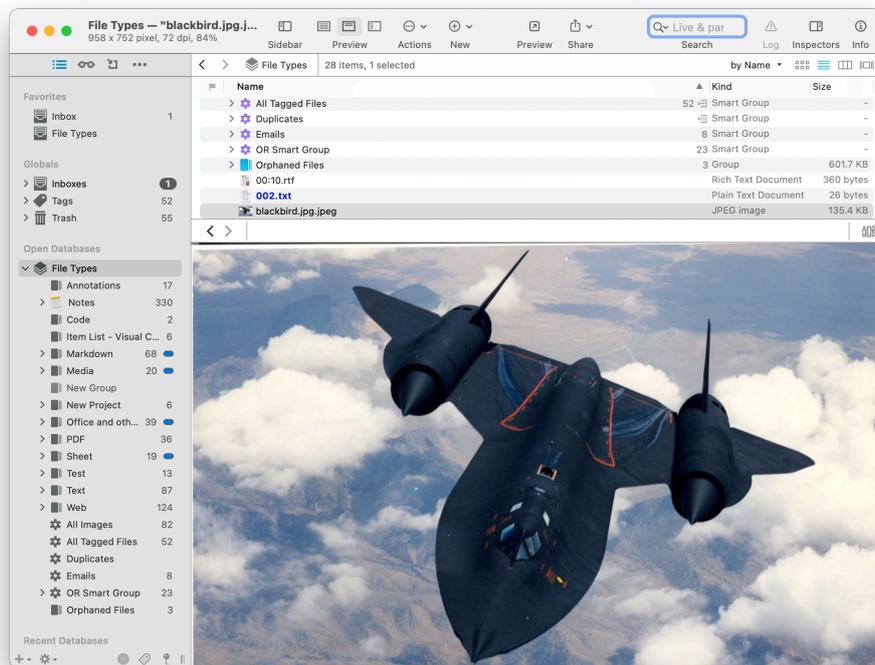
The main window is split into simple sections, some of which will be familiar from other applications. In fact, as we introduce the components of the window you'll see DEVONthink has many familiar elements in it. We start off with the fundamental panes you'll use.

VIEW/EDIT PANE

When You launch DEVONthink you will see an empty pane at the bottom of the window reading *Nothing Selected*. This is the *View/ Edit* pane, a preview pane displaying the currently selected document. This pane gives you a view of the content of compatible documents. It also allows you to work on compatible files directly in the main window when the pane is shown. Or you can hide the preview, perhaps if you want to concentrate on information about a group of documents.

You can can toggle the pane's visibility in the *View > Preview* menu or via a toolbar button.

Layouts:

- **Widescreen:** The *View/Edit* pane is displayed to the right of the item list, an option common in many Mac applications.
- **Standard:** The *View/Edit* pane is displayed under the item list. This is a bit more traditional but very useful on smaller screens, e.g., MacBooks.
- **None:** Hides the *View/Edit* pane. Note you can still select any file and press the space bar to preview it in a Quick Look pane, as needed.

As noted above, DEVONthink allows displaying and editing, and even creating, some file types. Please refer to the

Documents chapter for more information on this and other components related to the *View/Edit* pane.

ITEM LIST

When you open a Finder window, you are presented with a list of files in a certain location. The view may be icons or a list, etc. but you are still just viewing the contents of a folder, hard drive, etc.

DEVONthink is no different in this respect. When you open a main window, you will see a list of groups and documents in the current location. Clicking on or opening other groups shows their contents. Smart groups, just like the Finder's smart folders, also display their contents in an item list. The item list also supports familiar operations like drag-and-drop between groups, copy and paste, group and ungroup, context menu items when you Control-click, etc., just as you've done in the Finder.

Views: Again, taking a cue from the Finder, the item list allows you to display your documents in some familiar views:

- **Icon:** For the more visual folks, we have the ⠿ *Icon* view. This displays the thumbnails of the documents with just their name. You can choose *Show Details* to display some additional metadata in a widescreen view. Change the size of the thumbnails with the slider in the information bar, noting this will affect the amount of metadata shown as well when details are shown. Double-clicking groups behaves just as double-clicking a Finder folder, displaying the contents in the current or a new window, depending on the *Double-click*

opens groups in a new window checkbox in Settings > General. Note this view is best used without a preview or in standard layout.

- **List:** Behaving much like Finder's *List* view, the ≡ *List* view shows a list view of the items with metadata columns. Drag the columns left and right to reorder them to your liking. Sort them by clicking the column headers, switching between ascending and descending each time you click. Control-click the headers to add or remove columns. Or make these choices from the *Tools* menu.
- **Columns:** The Mac OS X Finder received the *Columns* view from its NextStep counterpart, then iTunes adopted it for browsing music. DEVONthink's ⠿ *Column* view functions in the same way. This option works best with a preview in standard layout, for quickly viewing selected files, but you can also use *Show Details* to display metadata and the file's thumbnail. Expanding the width of the column by dragging the separator will scale the thumbnail, if desired.
- **Cover Flow:** An iTunes feature that found its way to the Finder and DEVONthink is ⧉ *Cover Flow*. Similar to the *Icon* view but with dynamically created thumbnails, i.e., the displayed image is generated from the contents of the file. This side-scrolling item list can be useful when making visual assessments of documents. It is best used with a standard layout or without a preview displayed.

All these views can be easily changed in the *View > View* options, as well as the quartet of icons ⠿ ☰ ⫿⫿ ⫿◨ on the right-hand side of the Information bar.

Sort: In addition to sorting the item list by clicking column headers or using the *View > Sort* menu, you can also choose a sort method in the *Sort* dropdown menu in the information bar. By default it reads *by Name*. Also, notice there is a *Customize Metadata* command in the *Tools > Columns* menu, the context menu, and this menu. Select it to fine tune what columns are available to display, including any custom sets you've created yourself.

Visual Cues: DEVONthink provides some visual cues applied to items in the item list. These are also described in the Iconology section of the Appendix.
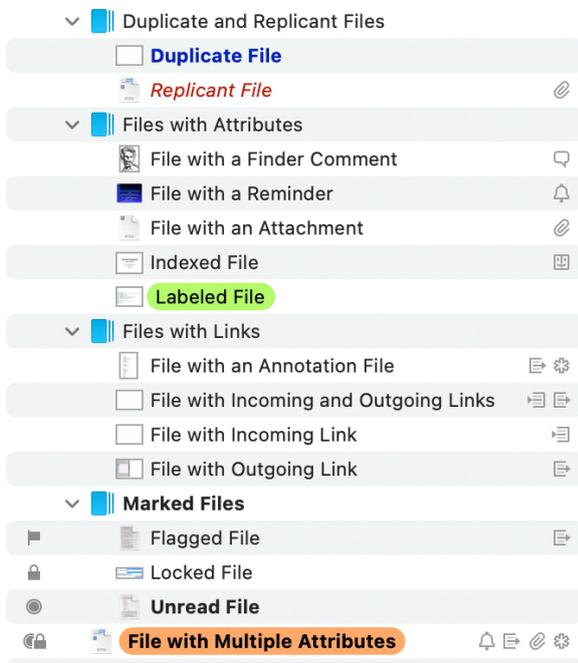
Duplicates and Replicants:

- **Duplicates:** Display their name emboldened in blue or with the ⫿ icon, depending on

your setting in *Settings > General > Mark duplicates and replicants in color*.

- **Replicants:** Display their name in red italics or the ⫿ icon, again depending on the preference setting.

Files with Attributes:

- **Finder Comment:** Displays a small speech bubble property icon.
- **Reminder:** Displays a small bell property icon.
- **Attachment:** Displays a paperclip property icon. Generally seen on email and RTFD files.
- **Indexed:** Displays a small Finder property icon.
- **Labeled:** Displays a chosen color on or near the filename depending on the *Label* option chosen in *Settings > General > Appearance*.

Files with Links:

- **Annotation File:** Displays an asterisk property icon as well as an outgoing link icon.
- **Incoming Link:** Displays a property icon of a lined square with an arrow pointing inward from the right.
- **Outgoing Link:** Displays a property icon of a lined square with an arrow pointing outward to the right.
- **Incoming and Outgoing Links:** Displays both the incoming and outgoing link property icons.

Marked files are ones with item attributes found in the *Data > Mark* menu. In *List* and *Columns* views, the property icons will not be shown unless the *Flag* option in *View > List Columns* is enabled.

Marked Files:

- **Flagged:** Displays a flag property icon.
- **Locked:** Displays a lock property icon.
- **Unread:** Displays a dot property icon and the name in bold. Groups containing unread items will also display their names in bold.

The *Flag* column shows the state, ⚑ flagged or unflagged, or the ◉ unread status of items. Clicking in the flag column toggles the flagged state. If an item is unread, a circle will appear in this column. If you have a group containing a mix of flagged and unflagged items, a dash will appear in this column, showing an indeterminate state.

Additionally, DEVONthink displays special property icons to the right of item names for attributes like Spotlight comments, reminders, etc. A key of the item icons can be found in the Iconology section of the appendix

Context menu items: When you Control-click in a Finder window, a context menu appears with a host of commands for you to choose from. DEVONthink's item list also has a context menu available. The commands shown depend on what is selected and in what pane you're using. A list of the commands can be found in the Context Menu Items section of the appendix.

> Note: To keep visual consistency and make some functions more broadly accessible, item lists are used throughout DEVONthink's interface, so you'll see them in some other panes. But note some functions, like specific context menu items, may change, depending on the specific pane you're using.

TOOLBAR

At the top of most Mac applications you encounter, including the Finder, you will see the toolbar. For people who prefer working with tracking devices, e.g., mice, trackpads, etc., the toolbar allows you to have quick access to some functions without having to go through the menus. DEVONthink also provides a toolbar in main and document windows.

The toolbar comes pre-installed with a handy default set of buttons, including the search field (see below). It can be customized via the *Tools > Customize Toolbar* command. You can also Control-click the toolbar and choose this command from the context menu. Add, remove, and reorder these items to suit your particular needs. On a side note, if you want to quickly reorganize items on the toolbar, hold the ⌘ Command key and drag the item to its desired location, or off the toolbar to remove it.

If you're looking for a little more space for your toolbar, or even a little less, you can choose to display the toolbar as *Icon and Text*, *Icons Only*, or *Text Only*. Do bear in mind, the *Icon Only* view will not show the current document's title or icon.

A list of the available toolbar items is available in the Toolbar section of the appendix.

SIDEBARS

Seen in scores of applications for many years, a sidebar is a top level organizational structure, typically found on the left side of an application window. The Finder or

Apple Mail sidebars are perfect examples of this. Looking at them, you should see the immediate similarities with DEVONthink. However, unlike most other apps, DEVONthink has multiple sidebars, each with their own special functions covered a bit later in this chapter.

INSPECTORS

In some applications, extra information about files is shown in a pane on the right side of a window. DEVONthink also provides such a pane in its main windows with individual sub-panes called *Inspectors*. For example, data about the name, tags, type, etc. of a selected file are available in the *Info Inspector*. Unlike other applications, it gives you multiple inspectors presenting more information and functions, all docked in the inspectors panes. This gives you quick access to all the inspectors in one unified window, especially helpful on smaller screens.

The inspectors are individually discussed in the Inspectors chapter.

SEARCH PANE
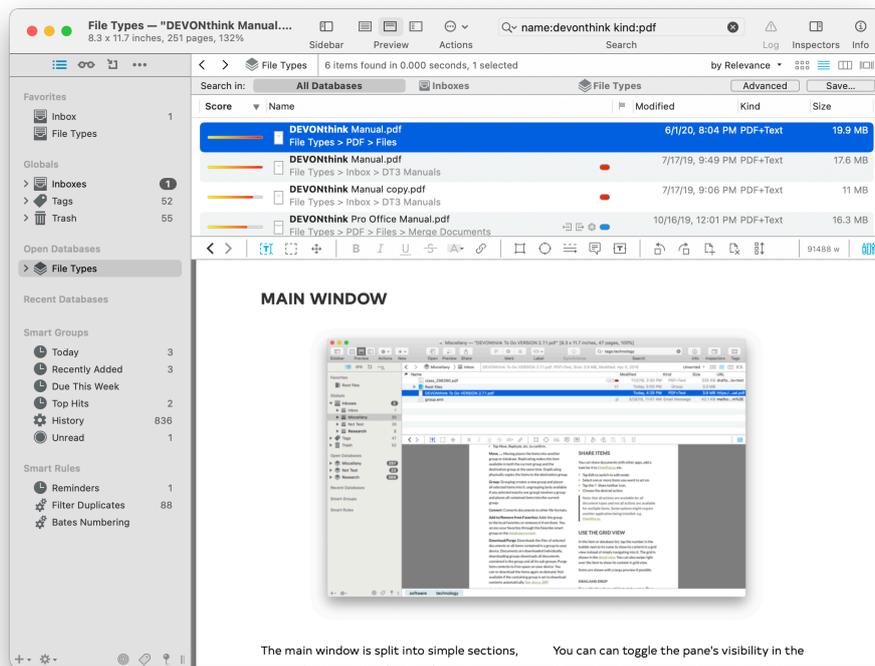
Storing information is a useful thing, but it's more useful when you can find things too. DEVONthink offers a strong search function for finding items in your databases, all integrated into a main window.

In the toolbar is a search field for entering your search terms. Type in a word and the search pane appears showing any matched items — and yes, it's another item list supporting the different views and sort methods discussed above. Additionally, the *View/Edit* pane can be shown to display selected results. For contents-based searches, the search terms will be highlighted in the preview, whenever possible.

Search options: In the search field, you will notice a 🔍⌄ magnifying glass icon. Click this icon to see where to search, list the ten most recent search queries, one choose among the following options:

- **Live while typing:** Enable this option to search while typing or disable it to search only when you press ↵ Return.
- **Partial matches while typing:** This option assumes an asterisk wildcard at the end of the last search term. That term is only matched as the beginning of a word. For example, typing "sync" is used as `sync*`, matching "synchronize" or "syncing" but not "resync". Enabling this option also activates *Live while typing* so the results dynamically change as you type. Press the ↵ Return key to treat the last term as a complete word.
- **Ignore Diacritics:** This allows you to ignore special marks on letters, like umlauts or accents.
- **Fuzzy:** This uses fuzzy-logic to expand the possible matches DEVONthink makes. For example, `hello` and `hullo` would be matched.

There is also a hidden preference, EnableSearchFieldAutocompletion, to allow DEVONthink to try to automatically complete words you're typing. However, this option only works when the search options *Live while typing* and *Partial matches while typing* are disabled.

Search prefixes: Anything you type into the search field will be treated as searching in all possible attributes. However, if you want to focus on specific attributes, e.g., file types or tags, the search field supports prefix operator searches, similar to Spotlight. Common examples are searches like `name:DEVON` or `tags:tech;sync`, separating multi-valued attributes like tags with a semicolon. There are a wide variety of prefixes available, as well as different prefix operators. A complete list of these items is included in the Search Prefixes section of the appendix.

In addition to search prefixes, DEVONthink supports Boolean operators, parenthesis for grouping terms, and quotes to match specific terms. Read more about operators and how to use them in the Search Operators section of the appendix.

Search scopes: After you've done a search, you will also see a bar above the search results allowing you to choose the scope of the search. The scope is the "where" you're searching. You will be shown *All Databases*, *Inboxes*, the name of the current database, and the name of the current group, if you're currently viewing one. Choose one to expand or limit where DEVONthink is searching. If you are searching in a particular location

and want to ignore possible matches in the subgroups, enable the *Exclude Subgroups* checkbox, as needed.

Advanced and save: To the right of the search scopes, you will see two buttons. Clicking the *Advanced* button displays the criteria of the current search. You can modify the search with the same kind of controls used in the Finder's smart folders, as well as some other applications with advanced search methods. Note these controls are also used in creating smart groups and smart rules.

If you have done a search you'd like to use again, press the *Save* button. Enter a name and DEVONthink will create a smart group for you. If your search scope is in a group, the smart group will be created there. If you are searching a specific database, the smart group is created in the root of the database. Searching inboxes or all databases creates a global smart group, shown in the *Smart Groups* section of the *Navigate sidebar*.

> Note: The search index contains alphanumeric characters as well as the following symbols: `$€£¥%§`

PATH BAR

On the left side of the main window, just below the toolbar, is the *Path Bar*. This is a specialized bar displaying a crumb trail of your current location in a database. For example, if you are in a nested group, it will show something like `Coding > AppleScript > WWDC > 416`, beginning with the current database.

Each item in the crumb trail is a live link, so you can click it to jump to any parent folder or back to the top level of the database. ^-click an item in the crumb trail to open the location in a new main window or reveal it in the current window.

This bar also has < and > buttons so you can navigate back and forth between locations you've visited in this window. Bear in mind, these buttons only relate to the history of the specific window. If you open a new window, it will have no history so the buttons will not function until you've navigated to some locations. As an added feature, click and hold one of these buttons to be shown a list of previous locations you've visited, just like in a web browser.

INFORMATION BAR

Another specialized bar, the *Information Bar* displays the number of items selected and the total number of items in the current location. As mentioned previously, this bar also hosts the *Sort* dropdown and the ⊞ ≣ ⊞ ⊪ view icons.

SIDEBAR: NAVIGATE

The *Navigate* pane is the default sidebar where you will access to your databases, tags, items located in *Favorites*, etc. Additionally, you have access to some specialized items: global smart groups and smart rules.
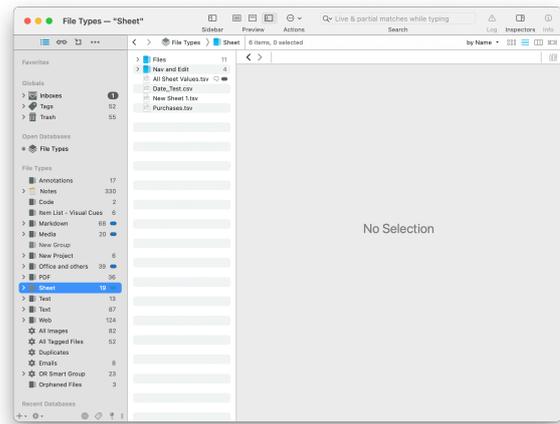
Each section in the Navigate sidebar has its own specific purpose: giving you access to frequently used files, navigating database groups, or viewing a list of similar files. The sidebar will only show databases and groups. Selecting one of these items will display its groups and files in the item list. This allows a clear view of the group structure in the sidebar, while still allowing you to interact with the contents in the item list. Alternatively, you can view the group hierarchies directly in the sidebar. Excluding smart groups and smart rules, selecting multiple items will show a union of their contents in the item list.

The sections in the Navigate sidebar can be dragged to reorganize them as desired. Sections you don't need to use as often can be collapsed to reclaim the space or to provide a bit of privacy.

UNIFIED ELEMENTS

By default, specific parts of databases are shown gathered in specific sections, similar to how Apple Mail displays the inboxes of all accounts in the same section.

Globals: The Globals section provides quick access to three locations common to all databases: the *Inbox*, *Tags*, and the *Trash*. If you click a top level section, e.g., *Inboxes*, you will see a combined view of items in the inboxes of all open databases. This can be especially handy if you want a view of all the tags you're using in your databases. Click the disclosure triangle next to each section to show the locations for each open database, allowing you to access the locations on an individual database level.
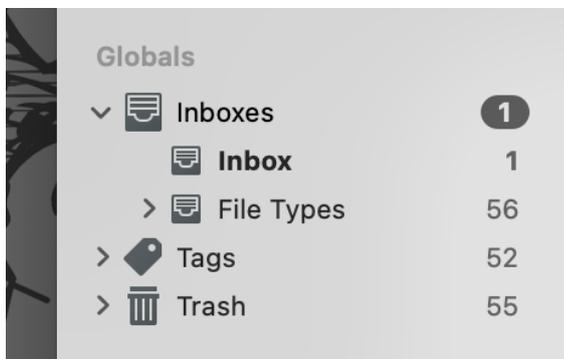
Inboxes: The inbox of a database, like the real-world counterpart on an office desk, is where incoming, unfiled items are kept. Every database has one by default and you can see the name of the database each inbox belongs to. The *Global Inbox*, shown just as *Inbox*, is a special, always-open database present in every installation of DEVONthink. This is highly useful when quickly capturing data, e.g., web clipping, screen captures, etc., without stopping to file things. You can then go back later and file these items at your leisure.

Tags: The *Tags* section provides quick access to all the tags you are using or tags within individual databases. If you click the top level tags, the item list will display all the tags you've created. Open this group and click on a database's name to show its tags. If you like to create nested or hierarchical tags, you can drag and drop existing tags in the sidebar or the item list.
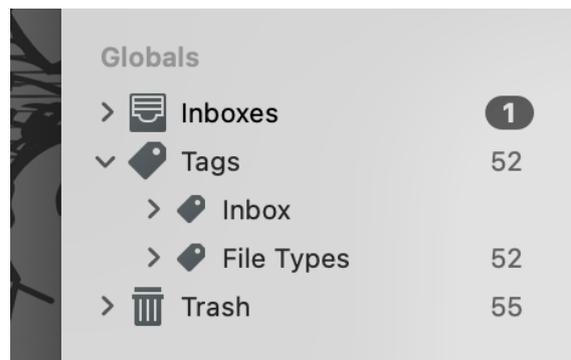
Typically you will use the *Tags* bar in the *View/Edit* pane or the *Info Inspector* or *Info* popup to apply or create tags. You can also drag items in your database to the individual tags. When you create a tag it will automatically appear in the *Tags* group of the database you're in. If you want to create new tags to be used later, select the *Tags* group for the database and choose *Data > New > Tag*. Or from the context menu, Control-click the database's top level *Tags* group or an existing tag and select *New Tag*.

If you find yourself in a situation with multiple tags you'd like to merge, select the *Tags* group for the current database to view the tags in the item list. You can then select the tags there and choose *Tools > Merge Items*.

Removing entire tag groups can be done by dragging and dropping to the sidebar's trash. From the context menu, you can choose *Move to Trash*. You can delete tags in the

item list as well. One thing to note: When you delete a tag, the original file in the database is preserved. What you see in the database's trash is the replicant that was created in the tag group when you added the tag.
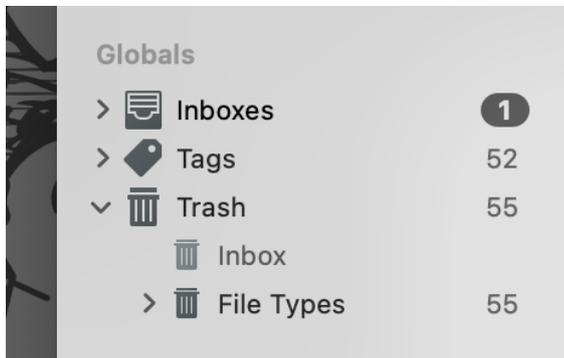
Trash: Every database has its own individual trash. This allows you to see, and potentially retrieve, items you've deleted from your individual databases. Just as with the real-world trash bin, we do suggest you empty your databases' trash regularly. It is not meant as another filing location, and items marked as *missing* will still register as a problem for a database. Select the trash, the top level or individual database's trash, and choose *DEVONthink > Empty Trash*. The command is also available in the context menu, when Control-clicking a trash. Trashed files are not deleted completely from the machine but are put into the system trash.
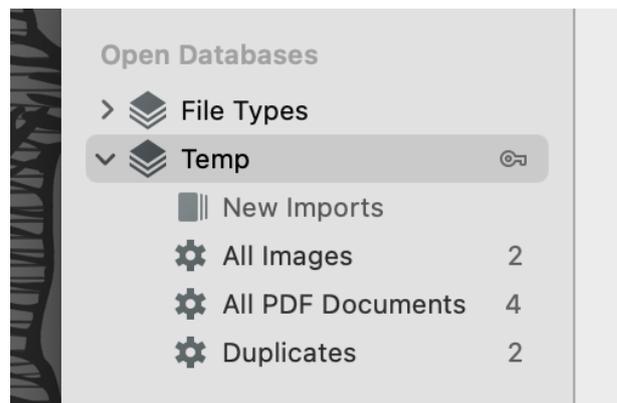
Open Databases: This section is where you see and access any databases you have currently open. Click the database's name to display items in the root of the database. Clicking the disclosure triangle allows you to show groups, and subsequently sub-groups in the database. As mentioned above, selecting a database or group will display its subgroups and files in the item list.

NON-UNIFIED ELEMENTS

As the unified views may be less comfortable for some people, DEVONthink allows you to decide what database elements you want to unify. Controlled by options in *Settings > General > Sidebar*, you can enable or disable unifying: *Inboxes*, *Tags*, or *Databases*.

Inboxes: If you disable unifying the inboxes, only the Global Inbox will be shown in the *Globals* section. The inboxes of individual databases will be shown in the item list when the database is selected.

Tags: Similar to the inboxes, disabling this option will display the Tags group with other elements in the selected database.
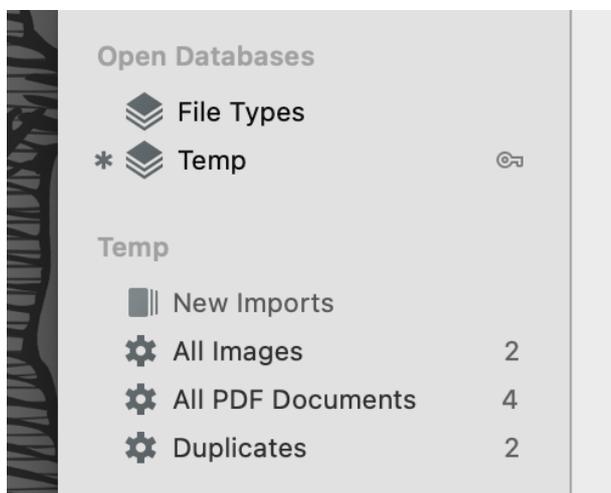
Databases: When disabled, DEVONthink displays a database's name in the *Open Databases* section of the sidebar but the contents will be shown in a separate section. The current database will be marked on the left by an asterisk (*) and its groups will be shown in a separate active database section in the sidebar. This creates an isolated view of that database regardless of the number of databases that are open. Interacting with elements in the active database section displays contents in the item list, similar to the Three Pane view from DEVONthink 2.

For switching between active databases, select another database and the active database section will display only the groups and smart groups of that database. Also, there are *Previous Database* and *Next Database* commands in the *Go* menu.

When using the keyboard, hold the *Command* key and press the up and down arrows to view the contents of another open database in the item list while showing the contents of the previously active database in the active database section. Press ⇧-↵ to change the active databases section to the currently selected database.

CONTEXT MENU

There are a few specific context menu items found in these sections of the Navigate sidebar. These commands are also found in the *File* or *Data* menus:

- **Copy Database/Item Link:** Copies a link to the selected item.
- **Database Properties:** Displays information about the chosen database.
- **Close Database:** Closes the chosen database. In the case of encrypted databases, the encrypted volume will be ejected as well.
- **Delete Database:** Deletes the chosen database to the system trash. This includes its cache and Spotlight index as well.
- **New Window:** Opens a new main window for the chosen database. When used on closed databases in the *Favorites* or *Recent Databases* sections, hold the ⌥ key for the alternate command, *Open Database in New Window*.
- **Rename:** Change the name of the chosen database. This can also be done in the *Database Properties*.
- **Reveal:** Display the location of the item and select it in the item list.
- **Show in Finder:** Reveals the database file in the Finder.

Any section-specific context menu items that may require explanation are discussed in their respective sections below.

FAVORITES

There are many times we have specific databases, groups, or documents we return to, again and again. Shown at the top of the sidebar by default, the *Favorites* section allows you to create shortcuts to quickly access any of these kind of items. Drag a group or a document to this section's header and you'll see a curved arrow on the cursor. Drop the file and you have a new favorite. An option to *Add to Favorites* is available in the context menu commands of most items in DEVONthink. Use *Remove from Favorites* when Control-clicking on already favorited items to remove them.

Select an item in *Favorites* to quickly access it. If an item was last viewed without a preview, it will be displayed in its own window. If you see a favorite is greyed out, it means the containing database isn't open. Double-clicking the item will open the database, if possible, and display the item.

Drag items in the section to reorder them. Groups in *Favorites* behave as normal groups, so you can drag items into a favorited group for quick filing. This includes using ⌥ and ⌘⌥ to duplicate or replicate items while dragging and dropping to them.

> Note: Favorites only support one level of content, so you can't group or nest items here.

RECENT DATABASES

The *Recent Databases* section provides quick access to reopen closed databases. This will list the last ten recently closed databases. Double-click any databases you'd like to open.

SMART GROUPS

The global smart groups function the same as local smart groups, i.e., the ones in your individual databases, but generally their scope is all open databases. This allows you to have reusable searches targeting all your open databases, e.g., all Markdown documents in all databases created in the last month. These global smart groups can be modified to target more specific locations, but such a smart group would be better suited as a local smart group, i.e., in the particular database. DEVONthink comes with some pre-installed global smart groups:

- **Today:** Shows all documents added or modified today.
- **Recently Added:** Shows all documents added in the last week.
- **Due This Week:** Shows all documents with a due date set for this week.
- **Top Hits:** Shows documents opened more than five times in the last 30 days.
- **Unread:** Shows all documents marked as unread.

You can create a smart group from the context menu or the + button at the bottom of the sidebar. By default all open databases will be targeted. However, if you have an item selected in the *Globals* or *Open Databases* sections, the smart rule will use that location for the matching.

Control-click a smart group to *Edit*, *Rename*, *Duplicate*, or *Remove* it. You can also copy a link to a smart group, export it to the Finder, or import previously exported ones. If you'd like to convert an existing smart group into

a smart rule, ⌃-click the desired smart group, hold the ⌥ key, and choose *Duplicate as smart rule*.

If you have exported smart groups in the Finder, double-clicking them will import them. You can also drag them to the smart rules section of the sidebar.

For more information on editing smart group properties, global or local, see the *Smart Group Editor* section of this chapter.

SMART RULES

Similar to smart groups, smart rules are created, edited, and behave in a similar fashion. However, they have one distinct difference: they can act on the items matched. The smart rule matches items just as a smart group does but they perform actions when certain events take place. This makes them a very powerful way to add automation to your DEVONthink life.

DEVONthink provides a few useful example smart rules to get you started:

- **Automatic Locking:** Locks unlocked documents (excluding RSS articles), that haven't been modified in the last 30 days. This requires user intervention.
- **Bates Number:** A specialized rule that adds the current database's name and a Bates number to a filename. The original name is preserved as a document alias.
- **Filter Duplicates:** Automatically puts duplicated items in a database's trash when you import them.
- **Reminders:** Displays the name of a document and plays the system "glass"

sound when a reminder on a matched item triggers.

- **Create Version:** Create a new versioned file.
- **Remove Obsolete Versions:** The companion to the *Create Version* smart rule, use this to purge old versions.
- **Unify Names in Dates:** Detects dates in a filename, retrieves the filename without the date, the renames the file prefixing the filename with the detected date as YYYY-MM-DD.

If you Control-click a smart rule and choose *Edit*, you will see the criteria, event trigger, and actions for that rule. Like smart groups, you can create a smart rule from the context menu or the + button at the bottom of the sidebar. The target of the smart rule also follows the same behavior as a smart group: all databases are targeted unless you have an item selected in the *Globals* or the *Open Databases* section of this sidebar.

Control-click a smart rule to *Edit*, *Rename*, *Duplicate*, or *Remove* it. You can also copy a link to a smart rule, export a smart rule to the Finder for archiving or sharing, or import previously exported rules. Double-clicking exported smart rules imports them, and so does dragging them to the sidebar.

In the context menu for a smart rule, notice there is also a smart rule-specific command: *Apply Rule*. This runs the clicked command on any matching files. This means it will performs its actions, even if the event trigger is not set to *On Demand*. Be cautious about using this command unless you are certain you want to affect all matched items. There is also an option to copy the item link for a smart rule by choosing *Copy Rule Link*.

Also when you Control-click a selected smart rule, you will see a *Disable Actions* or *Enable Actions* option, depending on the state of the selected rules. Use this to toggle the active state of any selected rules. This can be useful in debugging situations.

There are two commands in the Tools menu related to smart rules:

- **Tools > Apply Rules:** This runs the actions of a chosen rule on selected items, but only ones matched by the smart rule.
- **Tools > Perform Rules:** This performs the chosen rule as defined, not acting on the selection.

Drag and Drop: Lastly, you can drag and drop items onto smart rules to apply their actions to them. Dropped items will be acted on, ignoring the location and criteria specified in the smart rule. For example, you may have a smart rule to add the date to the beginning of the name of images imported into your Global Inbox. However, you could drag and drop a rich text file from a separate database on to the smart rule and the date would be prefixed to the name, even though the location and file type do not match the rule.

For more information on editing smart rules, see the *Smart Rules* section of the Automation chapter.

SIDEBAR: FILTERS

Providing yet another way to isolate files in the item list, the *Filters* pane allows you to only show files that share common attributes. This pane, displayed at the bottom of the *Navigate* sidebar an be shown or hidden via the *Tools > Filter* menu or the

trio of icons at the bottom of the *Navigate* sidebar. The pane can be resized by moving the divider at the top of the pane.

INFO

Displayed by selecting *Tools > Filter > Info*, the *Info* filters pane let you shows only files that share common dates, ratings, color labels, etc.
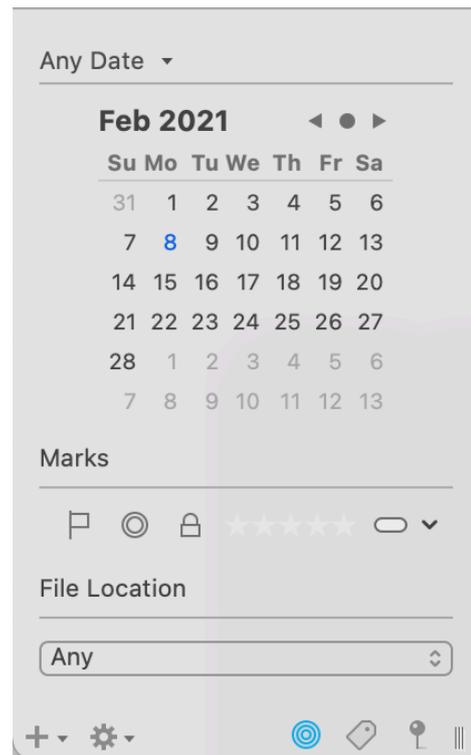
Dates: Click the *Date* dropdown to choose the type of date you want to filter on: *Added*, *Created*, *Modified*, *Opened*, or *Due*. Click on a date in the calendar display to only show files related to the day and type of date you selected. Use the small arrows to move backward and forward through time, and click the circle between them to quickly return to the last selected date.

Marks: Choose the type of mark, or a combination of them, on which you want to filter. For example, you can click the flag and a rating of 3 to show only those files. You can filter on these attributes:

- Flagged or unflagged
- Read or unread
- Locked or unlocked
- Rating
- Label

File Location: Click the dropdown to choose whether to display *Imported*, *Indexed*, or both with *Any*.

TAGS

Choosing the *Tags* filter via *Tools > Filter > Tags* displays a tag cloud derived from the tags on the current list of files. The cloud shows the tags in varying sizes depending on the number of occurrences of each tag on these documents. The more files with a given tag, the larger it displays. This makes it easy to identify commonly used tags. If there are no tags on the files in the current item list, *No Tags* will be displayed. Additionally, Control-click in this pane to sort the tags *by Name* or *by Count*.

To filter the files, click any tag. You will immediately see the tag cloud reduce in number and only related tags are shown. This allows you to drill down into files that share common tags, but also exposes tags that have been used with the previously selected tags.

> Note: The tags you choose will also be shown in the *Information* bar above the item list. Hovering over one of these tags displays a ✕ close button at the right side of the tag. Click it to stop filtering on that tag. You can also press the *Reset* button to clear all filtered tags.

Control-clicking a tag in the tag cloud shows these options:

- **Reveal Tag:** Displays the *Tag* group in the list of tags from all open databases.
- **Remove Tag:** Removes the tag from the *Tags* groups and also from any document it was applied to.

- **Related Tags:** Displays the top two tags most commonly used with this tag. Selecting a tag from this list filters the files on that tag.
- **View>:** Allows you to switch between cloud and list view.
- **Sort:** Allows you to sort the tags by name or count.

MULTIMEDIA

Open the *Multimedia* filter via *Tools > Filter > Multimedia* to present options for filtering out multimedia files, e.g., images, audio, and video in the current location.
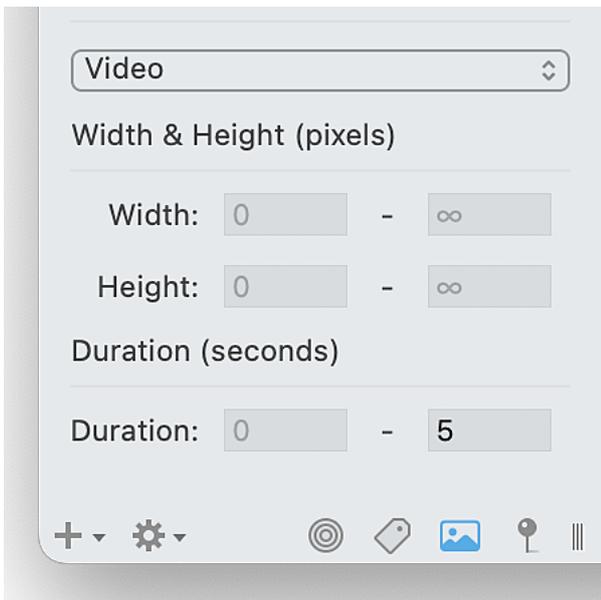
To assist in filtering, there are a few controls available:

- **Kind:** Select the kind: *Any*, *Image*, *Video*, or *Audio*.
- **Width & Height (pixels):** Set a minumum and / or a maximum pixel dimension for the width or height of images. Selecting and pressing the Delete key in a field will

reset it to zero or infinity (no maximum specified).
- **Duration (seconds):** Set a minimum or maximum length of a video or audio file, defined in seconds, e.g., `900` for 15 minutes (15 minutes x 60 seconds).

> Note: The Multimedia filter pane is only available in macOS 11 or later.

MAP

Utilizing geolocation data from your files, the *Maps* filter shows documents related by location. Show this filter pane by selecting *Tools > Filter > Maps*. By default, the pins on the map show the place a document was created. However, the geolocation data can be manually changed to a relative location, like the site of a historic event. (See the *Info Inspector* for more information on this.)

The map functions similar to Apple or Google Maps, allowing you to use familiar pinch gestures or double-click or Option-double-click to zoom in and out, panning, etc. The map shows pins for all documents with geolocation data in the selected location in the Navigate sidebar. Selecting a pin in the map displays the files with that geolocation data in the item list.

SIDEBAR: SMART GROUP AND RULE EDITOR
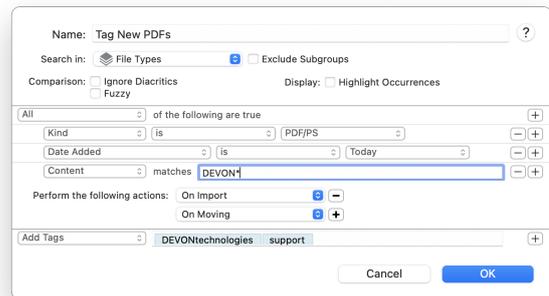
When you create or edit a smart group or smart rule, a sheet appears with options for specifying options, like the criteria to match or from where to match items.

OPTIONS

The top section of the sheet contains a mandatory name and search location, as well as a few optional items.

- **Name:** Enter a name for the smart item.
- **Search in:** Select where you want this smart item to search.
- **Exclude Subgroups:** Enable this to ignore items in subgroups of the location selected in the *Search in* dropdown.

In the *Comparison* section, you will see these options:

- **Ignore Diacritics:** Check this to treat letters with diacritics, e.g., umlauts or accented characters, the same as their regular counterparts.
- **Fuzzy:** Check this to apply fuzzy logic to contents-based criteria, ignoring simple typos so that instances of "hello" and "hallo" are both found.
- **Highlight Occurrences:** When used with contents-based matching, this will highlight

the terms in the text of selected search results, if possible.

PREDICATES

The second section of the editor shows the search predicates. These define criteria you want to match. Criteria may be content- or attribute-related, e.g., documents containing a specific word or groups added this week.

> Note: The predicate editor is also shown when using the *Advanced* options when searching your databases. It is also shown in a similar sheet when you run the *Tools > Batch Process* command.

The list of predicates consists of a list of blocks, each beginning with *All* or *Any*, defining whether all (Boolean AND) or any (Boolean OR) of the contained predicates need to be true for the document to be returned as a result. Predicates themselves consist of the field to search (like "Content" or "Tag"), and the condition and the data that needs to be matched.

Add as many criteria as you need. Use the + and - buttons to add more predicates to your smart group or to delete them. Predicates can be rearranged with drag-and-drop. Hold the ⌥ Option key and click a ... button to create a "compound predicate" also called "branch". Each branch also has its own *All* or *Any* option as well. This allows you to create very targeted searches.

> **Example:** To find all Microsoft Excel files use the condition *Filename ... ends in ... xslx*. To find items created in the last 7 days use the condition *Date created ... is ... Last Week*.

> Note: In some predicates you can use wildcards, Boolean operators, phrases, and parenthesis, too. See also p. 233ff

SIDEBAR: READING LIST

Similar to the section found in Safari (and now many other browsers), the *Reading List* provides a place to access documents and groups you've "set aside" for later consideration. The items are listed in *All* and *Unread* views. Newly added items are displayed at the top of the list.
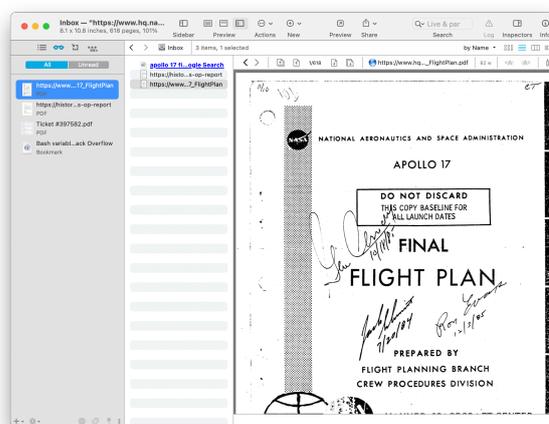
Add files from the item list via drag and drop when this pane is visible. Alternately, choose the *Data > Add to > Reading List* menu item. This command may also be available when Control-clicking in an item list or in images and PDFs.

Items added to this pane will automatically appear in the *Unread* view. Selecting an item with the *View/Edit* pane visible will treat the item as read and the item will only be shown in the *All* view.

Items in the *Reading List* can be moved to other locations by dragging them to any item list in a main window. The drag operations also allow you to duplicate or replicate the files, holding ⌥ or ⌥⌘, respectively.

CONTEXT MENU

The context menu (which appears when you Control-click an item) offers these commands:

- **Open in New Tab:** Opens the clicked item in a new tab.
- **Open in New Window:** Opens the clicked item in a new document window.
- **Mark as Read/Unread:** Changes the read state of the clicked item.
- **Reveal Item:** Reveals the item in its current location.
- **Move to Trash:** Moves the item to the database's Trash. Emptying the Trash removes the file and its reference from the Reading List.
- **Copy:** Copies the selected item(s).
- **Select/Deselect All:** Selects all or none of the items, respectively.
- **Remove Item:** Removes the clicked item from the *Reading List*.
- **Clear All Items:** Removes all *Reading List* items.

> Note: The last two options cannot be undone.

For those interested in automation, you can use the special item links `x-devonthink://readinglist` or `x-devonthink-item://readinglist` to open the Reading List.

SIDEBAR: IMAGE CAPTURE

The *Import* sidebar pane gives you access to two common sources of external data: scanning and email. Each section in this sidebar provides controls to import from any supported scanner or a compatible email client, e.g., Apple Mail or Outlook. This makes DEVONthink a reliable companion at home, in an office, in the hands of an archivist, and many other scenarios. We will cover the scanning controls in this section. We have also provided a more practical overview in Capturing Paper section of the In & Out chapter.
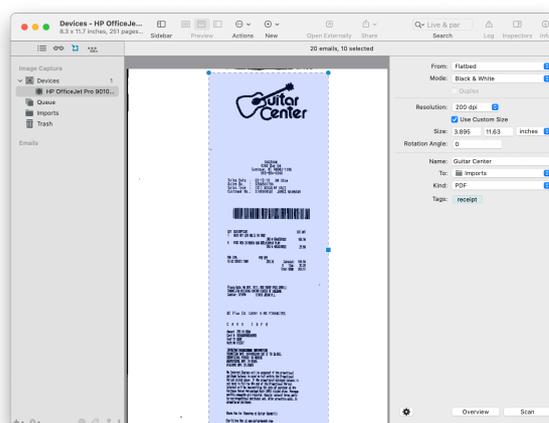
Archiving documents is an important function in many situations. The *Image Capture* section of this sidebar allows you to control compatible scanners or import images from connected cameras or iOS devices.

DEVICES

The *Devices* section allows you to choose an input device. Choosing a scanner offers different controls and options than selecting a connected iOS device or camera.

Selected Scanner: If you select a scanner you will be presented with controls and settings to scan your documents. This allows you to use your scanner directly in DEVONthink very efficiently. This interface should be familiar to anyone using Apple's Image Capture application or scanning in Preview.

- **Overview:** The overview of what's being scanned. When using a *Custom Size* you will define the scan area in this pane.
- **From:** Choose where you'll be inserting the paper into the scanner.
- **Mode:** Choose the color type: *Black & White*, *Grayscale*, or *Color*.
- **Duplex:** Enable double-sided scanning, if available.
- **Resolution:** Set the desired resolution of the scan. 300 dpi is the suggested resolution for most cases.
- **Size:** Choose a pre-defined page size or check *Custom Size* and manually change the scan area in the overview. Resize the scan area or even drag multiple scan areas on the same scan. You can also enter specific measurements. Switching to a pre-defined size will clear any custom scan areas.
- **Orientation:** Change the orientation of the final document.
- **Name:** Enter a name for the final document. If left empty, a date stamp will be used as an automatic name.
- **To:** Choose where to send the document: *Imports*, create a new binder or use an existing one, or choose a destination in a database.
- **Destination:** The chosen location in a database will be shown here. You can also

choose a location to send binders to when saving.

- **Kind:** Choose the format for the final document.
- **Tags:** Enter optional tags to be applied to the document.
- **OCR:** Enable OCR for the scan, if desired.

Camera or Mobile Device: Clicking on a connected camera or mobile device displays an item list of photos to import. These items can be imported for a variety of uses. Additionally, for documents you've photographed, the images can be added to a scanning document (described below) and OCR can be done to create searchable PDFs. This can be very useful for everyday things like receipts to archiving historical documents.

- **To:** Choose to import items to *Imports*, into a new or existing binder.
- **Thumbnails/Details:** Switch between a thumbnail or a detailed list of photos. The size of thumbnails is controlled by the slider at the lower right corner of the window.
- **Delete:** Shown as a stop symbol, use this to delete selected images from the connected device. A warning will be displayed this action cannot be undone.
- **Download:** Download selected items to the location set in the *To* dropdown. Optionally, you can double-click items to import them.
- **All:** Download all the items on the connected device.

QUEUE

Select the *Queue* option to display the scanning queue where you can pre-define documents to scan. Define parameters for each document, including: *Title*, *Destination*, *Type* (PDF or Image), *Separator*, whether *OCR* is enabled, and optional *Tags* for the finished document. This section can be very useful when batch scanning. The following controls are shown in this view:

- **Scanner:** Choose an available scanner.
- **Flatbed/Document Feeder:** Choose where you'll be inserting the paper into the scanner.
- **Document List:** Defined documents and their parameters are listed here.
- **Add/Delete:** Add or delete new document definitions.
- **Remove Sent/All:** Contained in a popup menu, remove already processed or all documents from the list.
- **Configure:** Global scanner settings for color type, resolution, page size, and duplex scanning (double-sided, if available).

IMPORTS

Containing individual scans or Binders, collections of scanned pages. Create or access existing binders and scanned pages in this section.

- **Document List:** A list of thumbnails of scanned images.
- **Create new Binder:** Create a new empty binder.
- **Properties:** Change properties of a selected scan or binder, e.g., where the scan will be sent, the title, type, tags, and

optionally enabling OCR. You can also add a *Author* or *Subject* for PDF output.

- **Edit:** Change the orientation or make image modifications of a selected scan. Double-click a scanned page to display the image modification pane.
- **Play:** Play video imported from an iOS device.
- **Delete:** Delete the selected scan(s).
- **Save:** Sends the selected scans or binders to the *To* set in the *Properties* for each.

Select a specific binder in the sidebar to show a thumbnail view of the pages it contains. Rearrange the pages by drag-and-drop or drag pages from one document to another. Press the *Sort* button to use these options:

- **Reverse Order:** Reorder all pages from last to first.
- **Shuffle Odd/Even Pages:** Automatically switch odd and even pages
- **Sort and Merge Documents:** Choose two documents to merge their contents. One document is chosen as the starting odd page, the other as the starting even page. The pages are then interleaved into the current document.

TRASH

Any scans or documents you've deleted from the scanning interface will appear here. When you have this selected, empty the trash with the button at the lower right corner of the window.

SIDEBAR: EMAIL

In addition to scanning, the *Import* pane also provides the controls to archive emails from Apple Mail and Microsoft Outlook. While you can drag email messages individually from your email client, the *Email* section of this sidebar also allows you to import individual messages or archive mailboxes directly into your DEVONthink database.

Open the *pane* pane by choosing *View > Import*. Here we discuss the controls used in this section. For a more practical overview of the email archiving process, check out the Archiving Email section of the In & Out chapter.
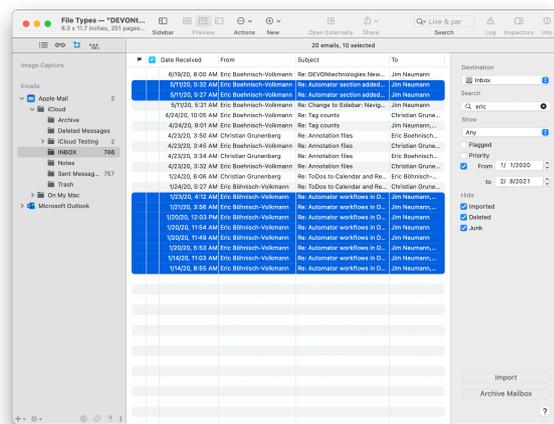
ACCOUNTS AND MAILBOXES

The lefthand section of the *Email* section displays the active accounts and mailboxes of Apple Mail or Microsoft Outlook. Select your email client, then click the disclosure triangle to show the accounts then its mailboxes.

Mailbox View: When you select a mailbox in a specific account, the window will display more controls for filtering and importing messages from that mailbox. The central view

shows the contents of a chosen mailbox. This is where you can select individual messages to import, if desired.

This view is separated into columns that can be sorted by clicking the column headers. The columns include *From*, *Subject*, *To*, the *Flagged* state. If you are choosing to show already imported messages, there is a special column showing those items. For emails marked as high priority, the flagged column will also show two exclamation points and the subject, etc. will show in red. Control-click in the *Mailbox* view to refresh its contents.

FILTER AND IMPORT

When a mailbox is selected, the righthand side of the window shows options for filtering the messages displayed. It also lets you choose the location where the messages will be imported.

Destination: Choose the destination database for the imported messages or mailboxes. Note: You can choose a specific group in a database when using the *Import* function. However, you can only choose a specific database, and not a group, when using the *Archive Mailbox* function. Emails are archived into a special *Emails* group at the root of the specified database.

Search: Use this search field to search for messages by the sender or recipient's *Name*, *email address*, or the *subject line*. Note this only allows for a single term to be used. However, the search is matching substrings, so a search for `jun` would match "junk", "jungle", and "jejune".

Show: Select options in this section to further fine-tune the list of importable messages, if desired. You can use:

- **Read:** Show emails messages have been read, unread, or either.
- **Flagged:** Show messages that have been flagged in the email application.
- **Priority:** Show messages that have an assigned priority
- **Date Range:** Choose a range of dates to display messages received between them.

Hide: Use these controls to hide certain items from the mailbox view. All these options are enabled by default, but can be selectively disabled, if needed. However, when these options are enabled it makes it easy to see only new messages, ready for import.

- **Imported:** Enabled by default, this hides messages you've already imported into the current database. As you can't import the same message into a database multiple times, changing the *Destination* changes what messages are displayed when this option is enabled. If you disable it, already imported messages will show a checkmark next to their name
- **Deleted:** Hide messages you've put in the account's trash.
- **Junk:** Hide messages moved to the account's junk mailbox.

The last two items are buttons for importing selected emails in the *Mailbox* view or archiving the currently selected mailbox.

SIDEBAR: EXTRAS

The *Extras* sidebar gives you a place to check for current information from us. It's an easy way to stay up to date with some of the goings on at DEVONtechnologies.

Support: Here you will find our recently published tips, scripts, smart rules, and templates.
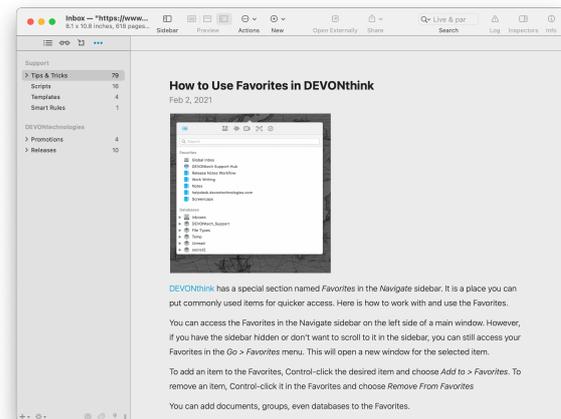
- **Tips & Tricks:** This shows recent blog posts of handy tips about all things DEVONthink, presented in a RSS feed style. To read the full article, click the article's title.
- **Scripts and Smart Rules:** From time to time, we publish publicly available scripts and smart rules. You will see a brief description and a link that allows you to install the script directly from this section.
- **Templates:** We also offer templates for a broad audience. This section lists recently published ones. As with the scripts and smart rules, a description and installation link is provided.

If you'd like to quickly mark all items as Read, ^-click and select the *Mark All as Read* from the context menu.

For a view of all available scripts and templates, as well as easy installation and uninstallation, see the Support Assistant.

DEVONtechnologies: This section provides a list of blog posts regarding updates and promotions.

> Note: For the sake of transparency, DEVONthink does connect to our web server to bring you this information.

DOCUMENT WINDOW
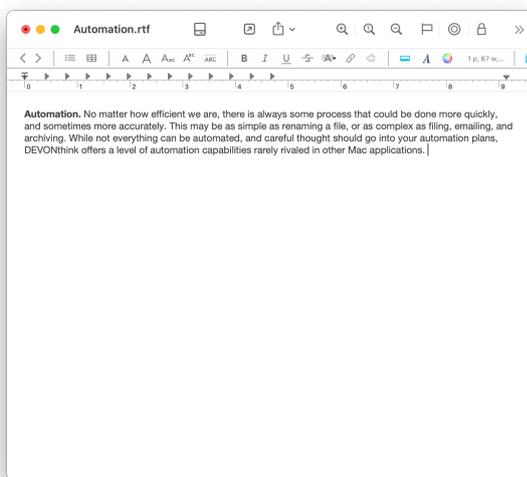
You can isolate a document in its own window, known as a document window. These windows are convenient for split screen work. For any editable file formats, you can open a document window by double-clicking a document in any view of a main window. Alternately, you can choose *Data > Open* or *Open* from the context menu to open any document in a document window. For most file types that can't be edited directly in DEVONthink, double-clicking the file will open it in the system default application. For

example, double-clicking a Word file will open it in the same application that opens if you had opened the file in the Finder.

See the Documents chapter for a detailed description of the various document types DEVONthink supports.

> Note: Command-clicking the window title shows the document's location including the database it's stored in.

TOOLBAR ITEMS

Similar to the main window, a document window has a toolbar at its top. The default toolbar buttons may vary, depending on the type of file being viewed in the window. You can customize the toolbar via *View > Customize Toolbar*, but note there are fewer options than you have with a main window. A list of available toolbar items is available in the Toolbar section of the appendix.

DOWNLOAD MANAGER

Window > Download Manager opens DEVONthink's *Download Manager* panel. Using the *Download Manager*, you can download files or complete web sites from the internet, and either store the information in your database or as files on your hard drive. Offline archives stored in DEVONthink are also used when you visit bookmarks or open a link in a new tab and your computer is currently offline.
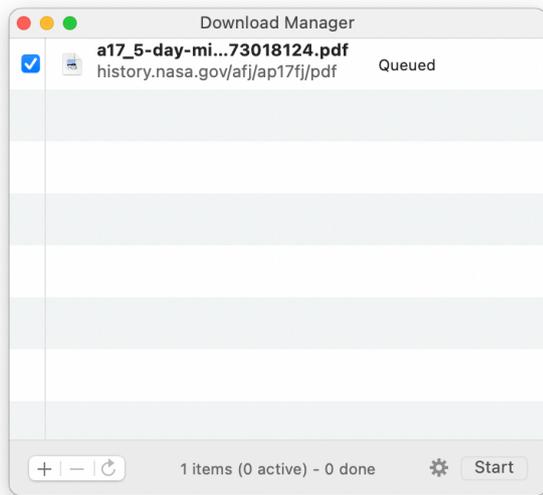
PANEL ELEMENTS

The *Download Manager* panel consists of:

- A list of a items to be downloaded
- A status bar at the bottom
- A ＋ button for adding items to and a ━ button for deleting selected items from the list
- A ↻ reload button
- A Start/Stop button to enable or disable downloads.
- An ✳︎˅ *Action* menu

ADDING FILES

To download a web site or any other file, simply add it to the *Download Manager* by dragging its URL to the *Download Manager* panel. Alternatively, you can click the ＋ in the panel and add the URL manually, as well as a referrer, user name, and password. If *Automatic* is checked, DEVONthink creates a referrer automatically when downloading whole web sites.

You can also paste one or more URLs (copied Safari bookmarks, DEVONthink links, or copied links from DEVONagent Pro's Download Manager), or add files to the *Download Manager* by using the context menu in web and HTML views in DEVONthink.

> Note: You can also copy URLs in the *Download Manager* to the clipboard or drag them to other applications (like the Finder or Safari's bookmark manager). The *Download Manager* also supports URLs for local files (POSIX path, a `file://localhost/` URL, or a `file:///` URL).

ACTION MENU

Most actions are available through the *Action* menu or the context menu. Click the ✳︎˅ gear button or Control-click an item in the *Download Manager* panel to display more commands:

- **Add:** Manually add a URL to the list.
- **Edit:** Edit the parameters of a selected item in the list.
- **Retry:** Attempts to reload an item that failed to download.
- **Remove:** Removes the selected items from the list. Alternatively, you can press the ⌫ Backspace or ⌦ Delete key.
- **Enable/Disable:** Checks or unchecks the selected items. Only checked items will be downloaded.
- **Start/Stop Queue:** Starts or stops the download queue. Same as the *play/pause* buttons at the bottom of the panel. Note this will only pause queued items. Any in progress downloads will continue.
- **Purge Queue:** Removes all items from the list that have been completely downloaded.

- **Only Added Files to Thumbnail Gallery:** Offers various predefined option sets (see below).
- **Import Files to Database:** Selects which database the downloaded files shall be stored in. Select *Folder* to save them directly to the file system.
- **Options:** Opens the options dialog sheet, which allows you to specify in detail what to download, which links to follow, and where to store the downloaded files (see below).

For your convenience, DEVONthink comes with predefined option sets that you can directly select from the action menu.

- **Only Added Files:** Downloads only the files you have manually added to the *Download Manager*.
- **Offline Archive:** Downloads the files you have added to the *Download Manager* including embedded images, style sheets, and scripts. Use this option set to archive/download web pages with everything necessary to display them properly. Alternative: Create a web archive.
- **Subdirectory (Complete):** Downloads the files you have added to the *Download Manager* including all embedded or linked files. This option set follows all links leading to (items in) sub-directories. For example, use this option set to download a complete web site for offline archiving.
- **Subdirectory (Images & Multimedia):** Same as above, but downloads only linked images, linked multimedia files including Flash and QuickTime movies, and embedded images in the item's directory and all sub-directories. Use this set to download a complete web site for

offline archiving (without all linked Office documents, PDFs, etc.)
- **Thumbnail Gallery:** Downloads the files you have added to the *Download Manager* including linked images, embedded images, style sheets, and scripts. Use this option set to download a thumbnail gallery including all full-size images linked to each thumbnail for offline archiving.

Note: Downloaded items are by default excluded from classification and tagging.

OPTIONS

The options dialog defines which file types the *Download Manager* downloads, which links it follows, and where it stores the files.

- **Files:** Check all file types you want the *Download Manager* to download (plain texts, rich texts, Office documents and PDF files, style sheets and scripts, images, embedded images, multimedia files, mark-up language files, etc.) Use the *Follow Links* pop-up menu to define how far DEVONthink should follow links on the downloaded HTML pages (see below). Check *Overwrite existing* to update an existing archive.
- **Folder:** When you choose *Download to > Folder* in the action menu of the *Download Manager* panel, DEVONthink stores all downloaded items in the directory you specify. Click *Set* to choose your preferred location. Use this option to use the integrated *Download Manager* for downloading software archives or other files you don't want to store in your

database. Double-click any part of the location to reveal it in the Finder.

- **Download:** Define how many connections the *Download Manager* opens at the same time. (Choose fewer connections for slower Internet connection, more for DSL or broadband.) Also, check *Automatically purge queue* to have previously downloaded items automatically removed from the queue.

The *Follow Links* options defines how far DEVONthink follows links on the downloaded HTML pages. This feature allows you to control what gets downloaded--only the actual pages or a complete web site. DEVONthink supports the following options:

- **Off:** Does not follow any links.
- **On Same Host:** Follows links, but only as long as they refer to the same web server/web site. Files on other web servers will not be downloaded.
- **In Same Directory:** Follows links, but only as long as they refer to items in the same directory as the downloaded HTML page.
- **In Subdirectories:** Follows links, but only as long as they refer to items in the same directory as the downloaded HTML page or its sub-directories.
- **One Level:** Follows all links regardless of where they point, but only one level deep. Links on pages linked to from the original page are not downloaded.
- **Two Levels:** Follows all links regardless of where they point to, but only two levels deep.

> Note: Following links two levels deep can result in very large downloads.

THE SORTER

The *Sorter* is a multi-purpose popup that allows you to quickly add content to your databases, even when DEVONthink isn't the active application. Depending on the option you choose in *Settings > Sorter*, it will appear in the menubar at the top of your screen or docked to the left or right side of your screen. When shown as a menu bar icon, you can choose to display it as the word *DEVONthink* or a space-saving nautilus icon.

It supports several views, each providing handy shortcuts to getting data into your databases. Switch between these views by clicking the icons at the top of the pane. Below we cover the different views the *Sorter* provides for quickly capturing data.

NAVIGATION

The Navigation view provides a convenient list of the databases and groups in DEVONthink.
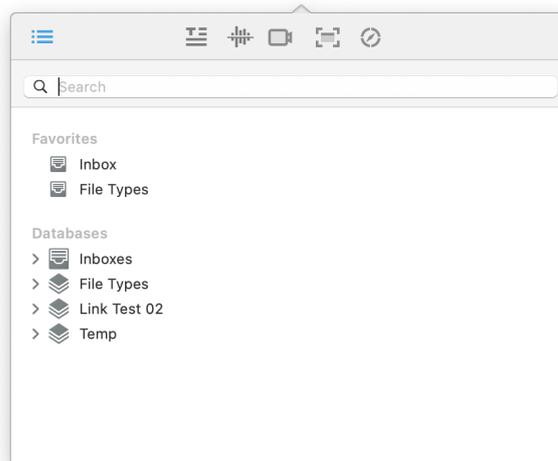
To add files in the *Sorter*, drag over the docked tab or menu bar item. The *Sorter* will spring open. then drop items into specific groups to quickly import them. Also equipped

with a handy search field, you can search for and isolate groups for more targeted importing. This view is composed of three sections:

- **Search Field:** Use the search field to help quickly locate specific groups. This uses substring matching, so you can enter parts of words to find matches. The view updates while you type for efficient searching.
- **Favorites:** Provides a convenient list of the groups you've added to the *Favorites* section of the global sidebar. Drag items onto your favorites to import them. Control-clicking a group or database gives you the option to *Reveal* or *Open* the item. You can also double-click an item to open it in a new window.
- **Databases:** Provides a list of open databases and access to their groups. Behaves in the same way items in your *Favorites* do.

Hotkeys: The Navigation view supports these hotkeys:

- **Tab:** Switch the cursor focus between the search field and databases list.
- **Command-Option:** Hold these keys when dragging Finder files or folders to [index](#) them.
- **Command:** Hold this key when dropping an item to move it into the database, putting the original in the system trash.
- **Up/Down Arrows:** Navigate up and down through the database listing.
- **Left/Right Arrows:** Open and close groups containing subgroups. Hold the ⌥ Option key while pressing the right or left arrow to

fully expand or collapse all the subgroups, respectively.

> Note: The ⎋ Escape key can be used in all views to quickly close the *Sorter*.

CREATING FILES

The remaining views are focused on creating files, whether that's a simple plain text file, a screen capture of an application's window, or some recorded video. Each of the following views support the following options:

- **Add:** Saves the file in the specified format in the chosen location. You can also press ⌘S to save the current content.
- **Reset:** Displayed as a ↺ backward pointing circular arrow, click it to clear the view to its default settings.
- **Control-Tab/Shift-Control-Tab:** Move the cursor between fields, e.g., between the body and URL. Hold *Shift* to cycle backwards through the fields.

TAKE NOTE

The *Take Note* view is for those times when you just need to quickly write a note but don't want to go back into your databases to create a new file.
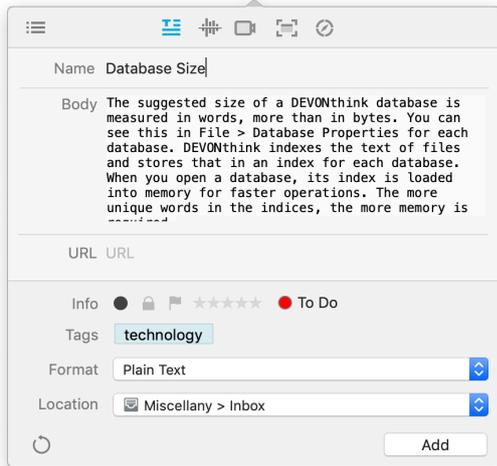
Allowing you to write notes in several formats, the text will be displayed in the font defined in *Settings > Editing*. Make your note taking a little faster by defining a hotkey with the *Settings > Sorter > Take Note Hotkey*. This view supports these attributes:

- **Name:** The title of your file. If left as *Automatic* DEVONthink will attempt to create a title from the first sentence of the body.
- **Body:** Enter your note text here.
- **URL:** If there is a URL you'd like to associate with the file, perhaps a link back to a source, enter it here.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Format:** Choose the format of the saved note. Choose from: plain text, rich text, formatted note, and Markdown.
- **Location:** Choose the location to save your file from the dropdown list. The location of

the last saved file will be preserved for the next note you create.

- **Add:** Saves the file in the specified format in the chosen location.

Take Note Panel: The *Take Note* panel is displayed when the *Sorter* is set to *None* in *Settings > Sorter*. It has the same functions as the view in the *Sorter* and also will be pinned over any open windows.

VOICE NOTE

Use this view to record a voice note directly into your database. This creates an AIFF-C file in the location you choose. With simple controls, it's easy to record impromptu audio.
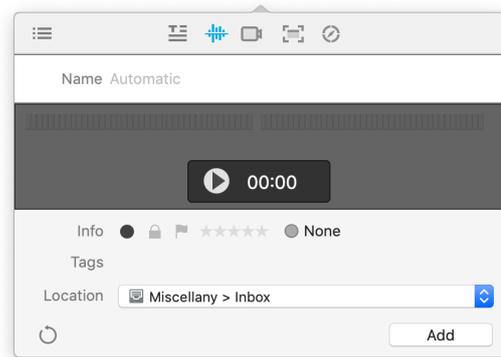
This view has a few simple sections:

- **Audio Levels and Timer:** At the top is a sound meter to help visualize your audio level as you record. The elapsed time is shown as it records, convenient for projects like rehearsing a presentation.
- **Begin/Stop Recording:** Press the red circular button to begin recording. Press the black square button to end recording.

When you've stopped recording, you will be shown:

- **Playback and Volume:** Playback your audio to ensure it's good before you save it. Press the *Reset* button to clear the audio and record again.
- **Name:** Enter a name for the audio file. If no name is provided, a date and timestamped name will be automatically given.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

VIDEO NOTE

Use this view to capture a video from your Mac's built-in camera. Videos are saved as [MP4 files](#) for convenient compatibility across platforms and devices.
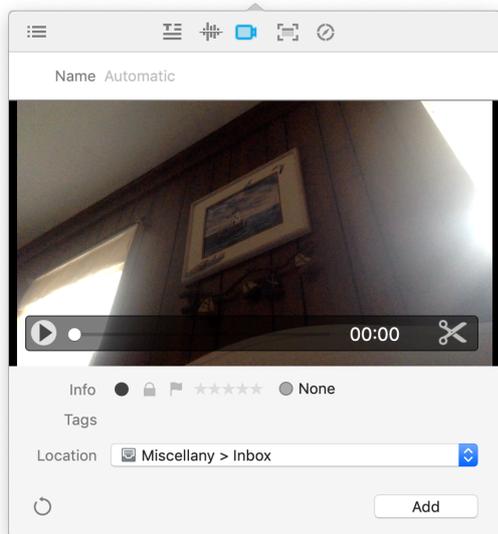
Like the audio note, this is presented in very simple controls:

- **Begin/Stop Recording:** Press the red circular button to begin recording. Press the black square button to end recording.
- **Source:** Choose the video and audio source in the small downward facing caret next to the record button. Any attached compatible audio-visual devices should be available here.

When you've stopped recording, you will be shown:

- **Name:** Enter a name for the video file. If no name is provided, a date and timestamped name will be automatically given.
- **Playback and Volume:** Playback your video before you save it. Or press the *Reset* button to clear the video and record again.
- **Trim:** Shown as scissors, click this to access simple editing tools. You can drag the ends of the yellow frame to change the start and end of the video. Click and drag inside the frame and a red line will appear. This displays the time above the line.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

SCREEN CAPTURE

Screen captures are a common way to quickly gather information about things on our computers. While the Apple provided mechanisms still work, the *Screen Capture* view allows you to quickly snap a screen shot, add some metadata, e.g., tags or labels,

then direct it to a specific location in your databases. The captures will be saved as [JPEG files](#).
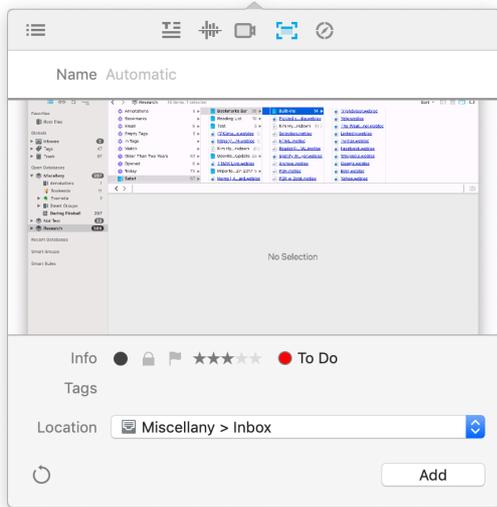
This view has one simple section with three options, also accessible via shortcuts:

- **Screen:** Capture your entire screen (⌘-1).
- **Window:** Capture a specific window (⌘-2). Hover over a window and it will be highlighted in blue. Click once to capture it.
- **Selection:** Capture a specified area by dragging a bounding box around the desired area (⌘-3). To reposition the area, hold the space bar. To stop the capture action, press the ⎋ Escape key.

As with other views, name and information options will appear after the screen is captured.

- **Name:** Enter a name for the screen capture. If no name is provided, a date and timestamped name will be automatically given.
- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.

- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

WEB CLIP

Use the *Web* Clip view to quickly clip the current web page, a URL from your clipboard, or enter a URL manually. Each option is also accessible via shortcuts.
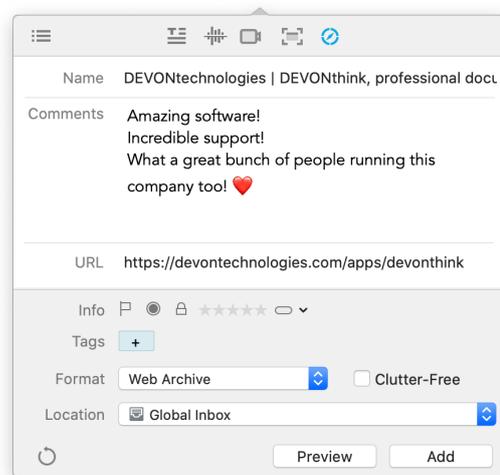
- **Default Browser:** Displaying the icon of your default browser, click this to capture the current page (⌘-1). This shows the same options as the [Clip to DEVONthink](#) browser extension.
- **Clipboard URL:** If you have copied a URL, click this option to detect and capture it (⌘-2).
- **Manual:** Click this to manually enter a URL to capture (⌘-3).

Before clipping, you can add other information to the item:

- **Name:** Enter a name for the screen capture. If no name is provided, a date and

timestamped name will be automatically given.

- **Info:** Add metadata about the file here, including: read status, locked state, flagged state, rating, or color labels.
- **Tags:** Enter tags for the file. Tag suggestions will be made from the tags of all open databases.
- **Location:** Choose the location to save your file from the dropdown list.

When using the default browser option or the Clip to DEVONthink extension, click the *Preview* button and DEVONthink will attempt to display a preview of the intended capture. This can be helpful in predetermining if the capture of sites with logins will be successful.

SETTINGS

The *Settings* window, opened using *DEVONthink > Settings*, contains all available options, which you can modify to adapt DEVONthink to your personal needs.

Because the application settings are so important, we have created a separate chapter for them.

DATABASE PROPERTIES

The *Database Properties* popup displays preferences for a specific database. Select a database and open the properties popup using *File > Database Properties*

GENERAL

Location: Shows the location of the database in your filesystem. Note you can double-click any part of the database location to reveal it in the Finder.

Create Spotlight Index: Checking this option allows Spotlight to be able to locate documents stored in your databases. Double-click a result in the Spotlight search results to open it in DEVONthink. If you are having issues finding DEVONthink documents in a Spotlight search, you can click the *Rebuild* button to recreate this folder from scratch.

OPTIONS

Name: Enter a name for your database here. It will appear in the title bar of every main window of this database.

A database has two names: the *displayed name*, set here in the properties, and the *filename*, the name of the database file in

the Finder. When you create a database, the names will be the same. If you change the displayed name in the database's properties, the name of the database file will also change. However, you can close the database and change the filename in the Finder, should you choose to. This can be used in any situation, including office, health care, and litigation environments where clients or cases have a unique number associated with them. A database could have a filename of `10459.dtBase2` but the displayed name of `Company A` in DEVONthink. When you close the database, the filename will be shown in the *Recent Databases* section of the Navigate sidebar.

Comments: Add comments about this database. These comments are only used in DEVONthink, i.e., not exported to the Finder.

Exclude Groups from Tagging: Excludes all groups in this database from being used as tags. Ordinary tags can always be added to items using the *Tag* bar.

Inherit Tags of Groups: Applies tags added to a group also to the group's children.

Case Insensitive Tagging: Check this option to disallow tags with different capitalization.

Protection: To add a layer of protection when syncing your databases, you can add a username and password to the database. Anyone trying to import the database from a sync location will need to provide these credentials. Click on the padlock button to unlock the entry fields, enter a *user name* and *password*, and then click on the padlock button again to lock your changes and hide the password.

Note: For a locally secured database, create an encrypted database via *File > New Encrypted Database*.

STATISTICS

This section displays some basic statistics about the contents of the database, e.g., counts of some different file types, total size of the contents, and number of words in the index of the database.

POPOVERS

Popovers are a specialized panel that appears on command and disappears after interacting with it. These are usually used for quickly viewing information about a selected item but can also be used in some other ways. For example, *Database Properties* is an information popover you may already be familiar with. Here are a few more DEVONthink offers, starting with information popovers and followed by utility popovers.

INFORMATION POPOVERS
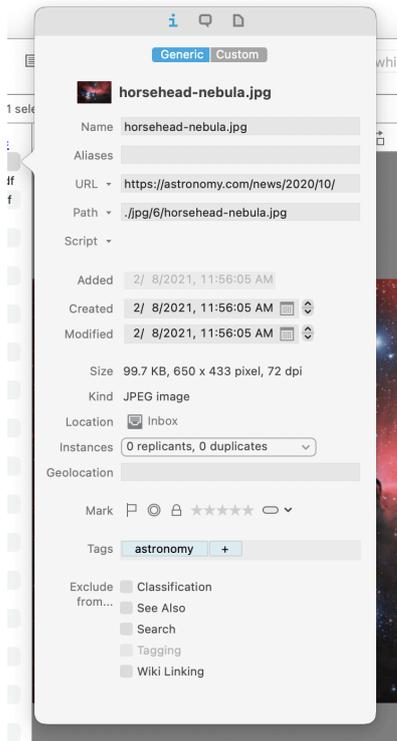
Info: The Info popover shows information about the currently selected item. It displays the contents of the [Info](#), [Annotations & Reminders](#), and [Properties](#) inspectors. Open this popover via [Tools > Get Info](#), ⇧⌘I, or pressing the ⓘ toolbar button.
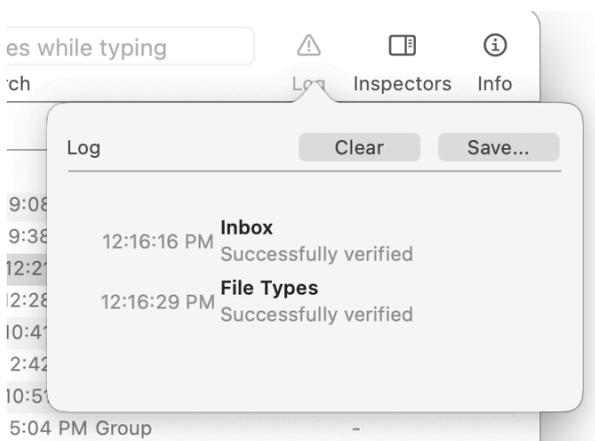
Log: The Log popover displays any information available in the [Log](#) window. This allows you to quickly glance at any messages without having to open a separate window. Open this popover via the ⚠ toolbar button.

Note this button will only be enabled if there are messages available to be viewed. You can clear the log or press the *Save* button to save the log, usually to send to our support team.

UTILITY POPOVERS

The utility popvers provide extra functions for moving files, navigating databases, or linking documents. Each popover has a search field at the top for helping to narrow the results. You can use an abbreviated search syntax matching the beginning of words to help speed the process. For example, if you are looking for a group named "Household Expenses" you could type `hou exp` to find matches. After tsearching, double-clicking a result will move the file to the selected location. For keyboard navigation, you can press ⇥ Tab to put the focus in the results list then navigate with the arrow keys. Pressing ↩ will accept the choice and close the popover automatically. There is also a plus (+) button for creating a new group in the current location when needed.
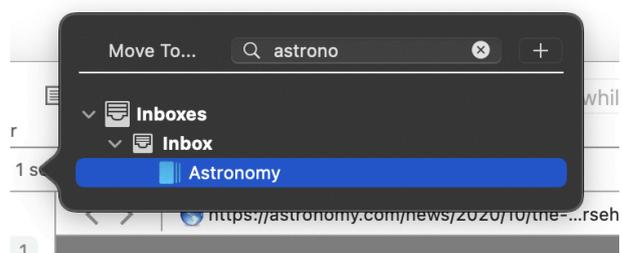
Move to: This popover allows you to organize selected files quickly. Open this popover via [Data > Move To](#) or pressing ⌃⌘M.

The default behavior of this popover is moving files. However, the behavior can be changed using command keys. Hold the ⌥ key to duplicate files to a selected location. Hold ⌘-⌥ to replicate the files to a selected

location within the same database. Note the text in the popver will change to reflect the kind of operation will take place.
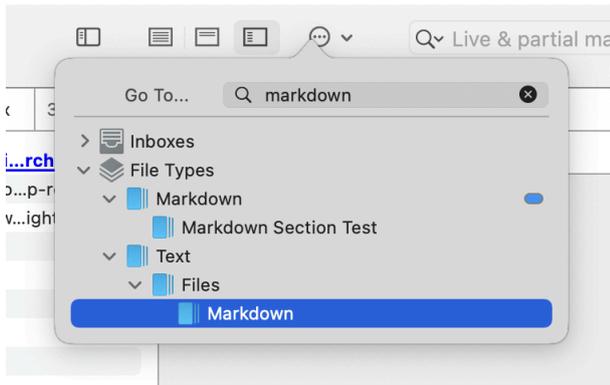
Go to Group: This popover allows you to quickly jump to another location. Open this popover via *Go > To Group* or ⌃⌘G. One special property of this popover is the ability to act as a floating pane. Open the popover then click and drag it away from the toolbar. It will remain open as a searchable floating pane you can use for quick navigation. You can also drag and drop files to it, similar to the Navigation view of the *Sorter*.
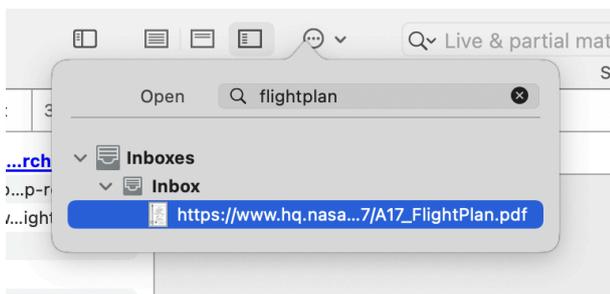
Go to Document: This popover allows you to quickly navigate to a specific file. Open this popover via *Go > To Document* or ⌃⌘O. Note this popover does not support abbreviated syntax, i.e., matching substrings or non-contiguous words, as the fuzzy matching would lead to far too many results. Given a filename of `DEVONthink sync timing tests.md`, `timing tests` would match; `DEVONthink timing` would not.
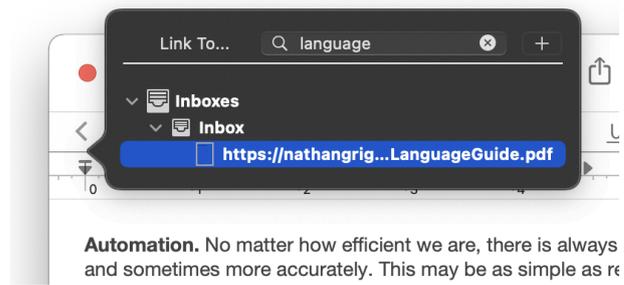
Insert Link: Used when editing text-based documents, e.g., rich text, this popover allows you to search for and quickly insert a link to that file in the current document. The type of link inserted will be appropriate to the current document type, e.g., a Markdown document will have a properly formatted Markdown link. Open this popover via *Edit > Insert > Item Link*, the *Insert > Item Link* command, or ⌃⌘E in the context menu while editing a compatible document.

WEB SHARING

DEVONthink comes with a built-in server for broadcasting your databases on a network. While the operation is covered in the *In & Out* chapter, here we cover the interface shown when accessing shared databases in a browser window. Also note the preferences for setting up shared databases, including setting up users and per-database permissions are covered in the *Settings > Server* section of the Preferences chapter.
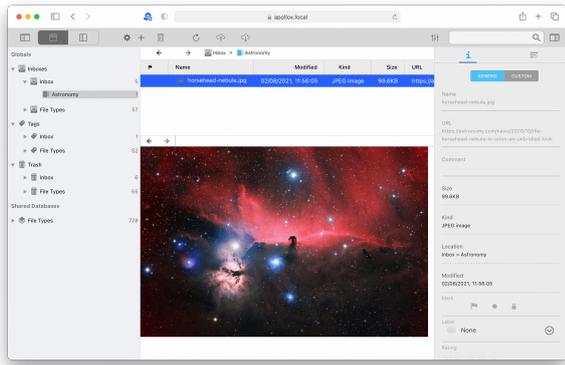
The layout of the web sharing should immediately be familiar to users of DEVONthink. While not as full featured as the native application, it behaves in ways similar to DEVONthink's main window. Here we will give you an overview of the parts of this interface.

> Note: The permissions given by the administrator of the shared databases determine database visibility as well as what actions you can take. Due to this, some actions, e.g., creating new documents or downloading documents, may not be available. If you do not have permissions to modify the database you're browsing, the cursor will change to show the option is disallowed.

SIDEBAR

A condensed version of the *Navigate* sidebar found in DEVONthink's main windows, this provides access to the contents of any shared databases. Some basic context menu items, e.g., *New Group*, *New Feed*, *Rename*, and *Move to Trash*, are available when Control-clicking in the sidebar.

Move files by dragging from the item list over a group in the sidebar to file them in a new location. Holding the ⌘ Command key allows you to copy the file instead of move it.

If you hover over a section in the sidebar, you can hide the *Globals* or *Shared Databases* section. Also, you'll notice this interface has been built in a responsive manner. This causes the sidebar to disappear when the browser window becomes to narrow for it be effective. You can still use toolbar buttons to toggle the visibility, as needed.

ITEM LIST

The item list, like its DEVONthink counterpart (See also p. 83ff), shows items in the current location. Items can be selected and reorganized by drag-and-drop, to the sidebar or groups in the same location. Above the item list is the path bath with active links to parent locations. Click on them to quickly jump back to a parent location. To navigate back and forth through locations you've visited, use the 〈 and 〉 buttons in the path bar.

Again, taking its example from DEVONthink's main window, Control-click items in the item list to show these commands in the context menu:

- **New:** The submenu allows you to create new items: *plain text*, *formatted note*, *Markdown*, *Bookmark*, *RSS feed*, and *groups*.
- **Get Info:** Shows the *Inspector* pane for the selected file.
- **Label:** Apply or remove a color label to a selected file.

- **Mark:** Toggle the *Flagged*, *Unread*, or *Locked* state of a selected file.
- **Rating:** Adjust the rating for a selected file.
- **Upload Document:** Use this to upload a new document to the database.
- **Download Document:** Download the currently selected file(s).
- **Move to Trash:** Move the selected file(s) to the database's Trash.

While you can't reorder the items manually, the item list can be sorted by clicking on the column headers. Click the header again to toggle between an ascending or descending sort. Control-click the headers to enable and disable individual headers.

VIEW/EDIT PANE

When an item is selected in the item list, a preview of any compatible file will be shown here. Many non-proprietary text-based formats commonly can be displayed. Plain and rich text, Markdown, JPEG or PNG files, PDF, etc. are easily searchable and viewable. There is also support for editing plain and rich text, formatted notes, and Markdown documents directly in this pane. Just click in the preview and begin editing.

Navigation bar: The navigation bar above the pane varies what it displays, based on the type of file it's displaying. If an item has a URL, it will be active and displayed here. The bar also allows you to move back and forth through previously viewed files via the ‹ and › buttons.

Of special note are the behavior of formatted notes. They are displayed with a handy toolbar providing some editing options, like adding bold or italic type. You can also select

text and create a hyperlink with it. Lastly, you can choose an image to insert into the document.

For the Markdown fans, you will see the same navigation bar options, showing *Edit*, *Preview*, and *Side-by-Side* modes.

> Note: While it is a force of habit — and in general, a good one to be in — you do not need to press ⌘S after editing a file. The changes are saved automatically.

INSPECTORS

Info: A simplified view of the *Info Inspector* pane found in a main window. Shown by clicking the right-most toolbar button or choosing the *Get Info* command from the Action button, this shows basic metadata about the item selected in the item listing. If you have permissions to make changes to the current database, it is possible to change some of the metadata, like ratings or labels.

See Also: The second view of the inspector shows the See Also pane. This gives you some suggestions about other documents that may be related to to the currently selected item. Clicking on an item in the results will display that document in the view/edit pane.

TOOLBAR

There are a handful of toolbar tools in the web sharing interface. Note a few items will be discussed separately.

- **Show/Hide Sidebar:** Toggles the visibility of the *Globals* sidebar.
- **Preview:** Toggle between standard and widescreen view, with the preview on the bottom or right, respectively.

- **Action:** Displayed with a gear icon, this shows the same options as the context menu in the item list.
- **Add:** The submenu allows you to create new items: *plain text*, *formatted note*, *Markdown*, *Bookmark*, *RSS feed*, and *groups*.
- **Move to Trash:** Put the selected item in the database's trash.
- **Refresh:** Manually refreshes the current item list.
- **Download Document:** Downloads the selected items in the item list and downloads them to the downloads location for the browser you're using. For some formats, a ZIP file may be created and downloaded.

- **Language:** Switch the interface language between English, French, and German.
- **Search:** Search for files in the open databases by entering search terms. Search prefixes can be used and are covered in more detail here: See also p. 87ff
- **Show/Hide Inspectors:** Toggle the Inspectors panes.

SUPPORT ASSISTANT

The integrated *Support Assistant* combines a welcome screen with a first launch assistant, tips, installable extras, and a support page that guides you through the available support options.
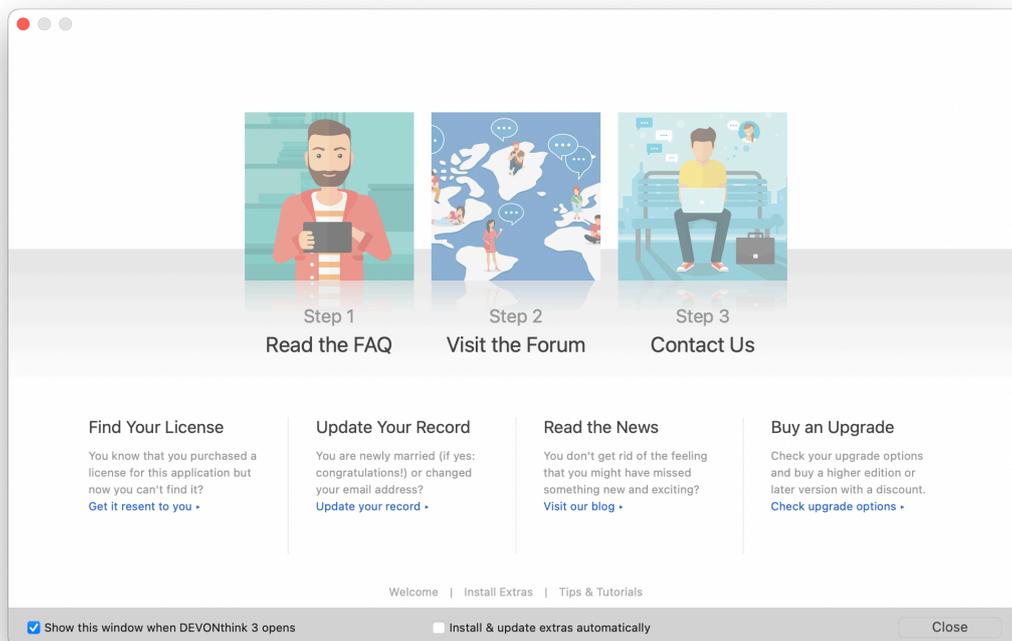
WELCOME

This screen welcomes you when you start DEVONthink for the very first time. It offers:

- The option to subscribe the free DEVONtechnologies newsletter, as well as a number of welcome tips
- The tip of the day
- The extra of the day

Click the links at the bottom of the window to access the other *Support Assistant* sections. You can also check or uncheck the *Show this window when DEVONthink opens* checkbox at the bottom of the window to set whether to show the *Support Assistant* each time DEVONthink is launched.

FIRST LAUNCH ASSISTANT

The first launch assistant opens automatically the very first time you open DEVONthink, and guides you through the first steps of using the application: creating a new database, installing the add-ons, and adjusting the preferences.

GET SUPPORT

The *Support* screen guides you through the three common steps for troubleshooting DEVONthink. In addition, you can update your details in DEVONtechnologies' customer database, or buy an upgrade or a second license.

INSTALL EXTRAS

On the *Extras* screen, DEVONthink lists all available extras that you can download and install from DEVONtechnologies' server:

- Scripts
- Templates
- Smart Rules

Browse the list of extras and install them with the *Install* button. The last line of the description shows where in the *Scripts* or *Templates* menu the extra will show up after installation. Remove installed extras with the *Remove* button.
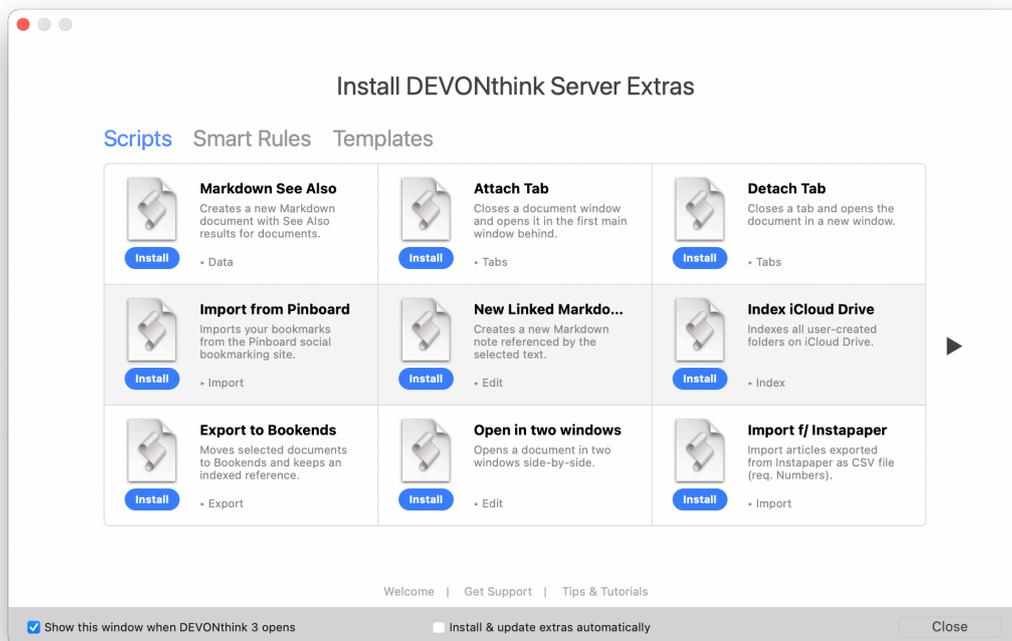
The extras are updated live from DEVONtechnologies' server so it's a good idea to check back from time to time. The latest extra is also always mentioned on the welcome screen. If you check the *Install & update extras automatically* checkbox at the bottom of the window, any updates to scripts or templates you've downloaded here will be updated as needed.

> Note: If one of these categories does not show up in your copy of DEVONthink, there might be no extras of this type currently available.

TIPS AND TUTORIALS

Here you can find the latest tips and tutorials to help you squeeze the best out of DEVONthink. Tutorials can be slideshows describing basic tasks in DEVONthink or screencasts.

Both tips and tutorials are updated live from DEVONtechnologies' server so it's a good idea to check back on a regular basis. The latest tip or tutorial is also always mentioned on the welcome screen.

LOG

The *Log* panel displays messages and warnings when importing files and folders, results of performing maintenance routines, and AppleScript errors from script actions in smart rules or reminders. The panel shows the date of the message, any affected files, and a little information about what happened. If you feel you are having sync issues, this panel is the first place to look.

Also, when doing any database or sync location maintenance, this is where the results are shown.
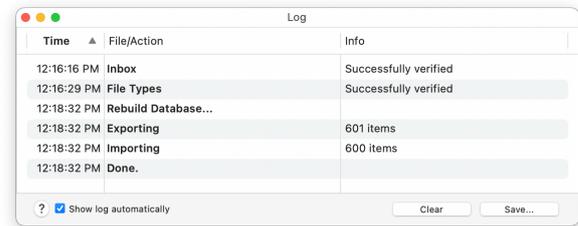
You can save the list to a text file with the *Save* button, and clear the log with the *Clear* button. To sort the log, click a column title to sort on that column, changing from ascending to descending each time you click it. If you Control-click individual log entries you will be shown options to reveal the item in its location or move it to the trash. Alternatively, double-click the entry to reveal the file.

Uncheck *Show log automatically* to prevent the log popping up automatically. You can open the *Log* panel at any time using *Window > Log*. For important notifications, the log is always shown automatically, ignoring this setting.

ACTIVITY

The *Activity* panel shows a list of currently running background processes, e.g., converting scans to searchable PDFs, refreshing news feeds, downloading PDF documents and web archives via our browser extension, or sync activity. You can manually open this pane via *Window > Activity*. You can manually stop them to free computer resources or for other reasons.
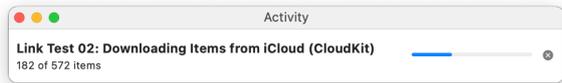
There is also an *Activity* pane at the bottom of the *Navigate* sidebar. Providing a less intrusive experience, this pane will appear and disappear quietly on its own.

INSPECTORS

IN THIS CHAPTER

The Inspector panes displayed on the right side of a main window provide an incredible amount of information and functionality when working with files in DEVONthink. Covering a range of options, from basic metadata to setting reminders to in-document search and replace functions. Each of the Inspectors is individually covered in this chapter.

INFO PANE
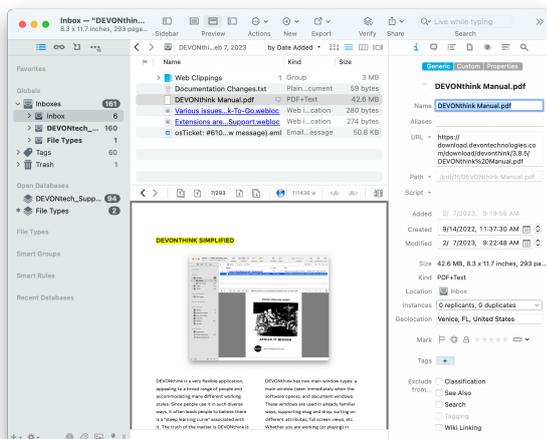
The *Info* pane, just like its counterpart in the Finder, displays additional information about a selected document or group, from icon and

name to comments and other metadata. Open the *Info* pane by selecting *Tools > Inspector > Info > …*.

> Note: When you have multiple items selected, some editable attributes can be modified. For example, tags can be applied to multiple files at once. However, if you add tags to the same files separately, only tags common to them will be shown if you select them together again.

GENERIC

The *Generic* view shows additional basic information about a selected document or group, similar to what is shown in the *Get Info* window in the Finder. Additionally, it shows some other attributes like ratings, color labels, and geolocation data. Here are the attributes shown:

- **Icon and Name:** Displays the name of the selected item. To change the icon of the item, select it and paste any image you want over it. To change the name of the item, use the *Name* field below.
- **Name:** Displays the name of the selected item. This is an editable attribute.
- **Aliases:** Displays any aliases for the selected item. Enter one or more words here, separated by semicolons, as alternative targets for Wiki links. Generally, Wiki links refer to the name of contents, and aliases make this system even more flexible.

- **URL:** Displays a URL associated with the selected item. This is an editable attribute. While it is typically used for web addresses, it also may contain other types; e.g., file URLs, URL with custom schemes, etc. Click the down arrow and choose: *Launch* to open the URL, *Copy* to copy the URL to the clipboard, or *Remove* to clear the URL.

- **Path:** Displays the item's file's path in the Finder. This is not an editable attribute. Click the down arrow and choose: *Launch* to open the file in the system default application; *Show in Finder* to open a Finder window with the file selected, and *Copy* to copy the file path to the clipboard. If you are indexing files, there is a *Path* option that allows you to select a folder or volume. If you have moved indexed files to a new location, this option can be used to select the new location, provided you have not renamed any of the files before updating the path.

- **Attached Script:** Displays the name of an AppleScript script attached to the object. This is a script that is triggered when you select the item in the database. Click the down arrow and choose: *Select* to choose a triggered script to attach, or *Remove* to remove the script from the item.

- **Added:** Displays the date an item was added to the database. This is not an editable attribute.

- **Created/Modified:** Displays the date an item was created or modified. These are editable attributes. Click the calendar icon to choose a date and time. You can also select individual parts of the date or time and type or modify them with the up and down arrows. When typing, press the ⇥Tab key to commit the change.

- **Size:** Displays the size of the item. For groups and news feeds, this field shows the size of all contained items.

- **Kind:** Displays the kind of the selected item. For documents, the file type will be shown, e.g., Markdown.

- **Location:** Displays the location of the item in the database. This is an active item; hovering over items will display their full names and clicking them will navigate to the clicked group.

- **Instances:** Displays how many duplicates or replicants of the selected item are in the database. Click to show a pop-up menu listing all instances and duplicates and their enclosing groups. Select any item to reveal it.

- **Format:** For news feeds you can set the default format in which new articles are saved.

- **Color:** Allows you to set a color for a tag. Only available when a tag is selected. Click the title *Color* for options to clear or copy the color.

- **Geolocation:** Displays geolocation data based on the creation origin of the file; i.e., the geographic location when the file was originally created. This is an editable attribute and can be changed if you'd like the location to be relative to something else, e.g., the site of a historic event.

- **Marks:** Displays these attributes for the selected item: *Flagged*, *Read*, *Locked*, *Rating*, and *Label*.

- **Tags:** Displays the tags applied to the current item. Click the + button to add a new tag. Tags will be suggested from the existing tags in the current database. If the

item is selected from the *Inboxes* in the sidebar, suggestions will come from the tags of all open databases. Click an added tag to reveal the Tag group, or remove it from the selected item.

Exclude From...: These checkboxes allow you to exclude an item from being used in various ways. For example, you can exclude temporary groups from classification to increase the accuracy of the built-in artificial intelligence. You can exclude an item from these operations:

- **Classification:** When enabled on a group, this will keep DEVONthink from suggesting or using the group as a possible filing location.
- **See Also:** When enabled on any file, DEVONthink will not include it as an item potentially related to the current file.
- **Search:** When enabled on any item, it will no longer appear in toolbar search results, smart groups, or smart rules.
- **Tagging:** Used with group tags and Tag groups, this inhibits the Tag from being applied to any item.
- **Wiki Linking:** When enabled on any item, it will not be detected by automatic WikiLinking, neither by name or alias.

CUSTOM
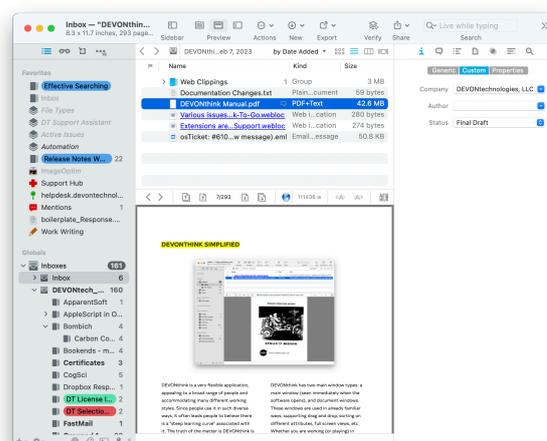
The *Custom* view displays custom metadata fields and their values. These custom fields are defined by you in *Settings > Data*. All available fields you have defined are shown in this pane. Note some fields may be specified as data types that include some extra actions in this view. For example, if you create a custom parameter with an *Item Link* data type, you will have an option to reveal the file.

> Note: Like many types of metadata applied to files by various applications, custom metadata is not cross-platform. On macOS, it is stored in the extended attributes upon exporting the file.

- **Item Link:** Click the down arrow and choose: *Reveal* to reveal the item in the database.
- **Single-line Text:** Type in a value or click the dropdown menu to choose from a list you defined in the preferences .
- **URL:** Click the down arrow and choose: *Launch* to open the URL or *Copy* to copy the URL to the clipboard.

PROPERTIES
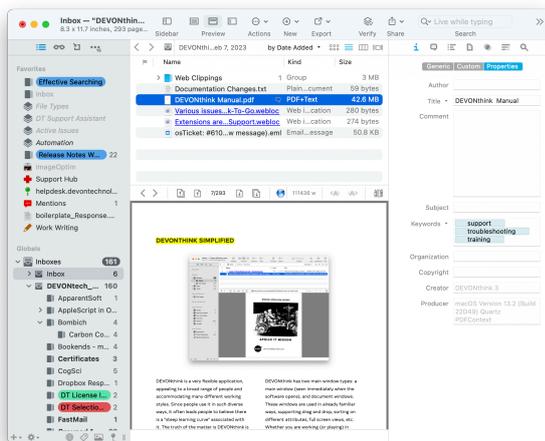
The *Document Properties* section gives you access to certain format-specific metadata. Supported formats are: RTF, PDF, audio or video with metadata, or images. This metadata can include some of the following:

- Author
- Company
- Copyright
- Title
- Subject
- Keywords
- Comments
- Organization

Depending on the document type, you may be able to edit or view these properties. More fields may be available depending on the document type.

There are two parameters supporting extra actions:

- Click the *Title* button and select *Copy*, or select *Set Name As* to quickly change the document's name.
- Click *Keywords* and choose *Convert to Tags* to apply the keywords as DEVONthink tags.

ANNOTATIONS & REMINDERS
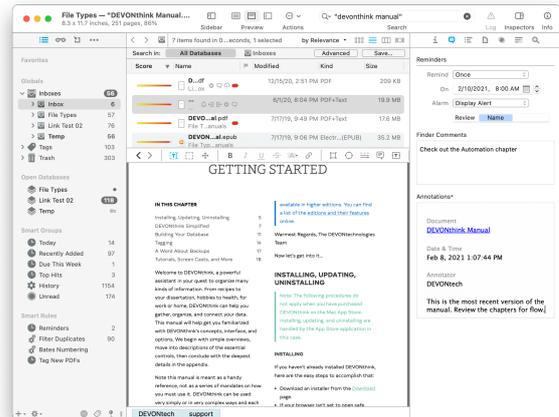
This pane contains *Reminders*, *Finder Comments* and information about *Annotations*. It can be shown *Tools > Inspectors > Annotations & Reminders*.

REMINDERS

While there are many reminder applications, including Apple's own Reminders, sometimes you just want to set a quick reminder for an item, or multiple items, in DEVONthink. The *Reminders* section allows you set a reminder, even a recurring one, as well as an optional alarm.

After choosing a schedule, set a date and time for the reminder or to begin a recurring reminder. For recurring alarms, the data or time you set will be the beginning of the alarms. Reminders can be set to:

- **Once:** Only trigger an alarm once.
- **Hourly:** Set an hourly reminder, triggering at the minutes of time you set, e.g, 10:15, 11:15, etc. Set an interval for how many hours should elapse before the next reminder, e.g., 4 for every four hours.
- **Daily:** Set a daily reminder, triggering at the hour and minutes you set, e.g., daily at

9:35 AM. Set an interval for how many days should elapse before the next reminder, e.g., 2 for every other day.

- **Weekly:** Set a weekly reminder, triggering at the hour and minutes you set. Choose a day of the week the reminder should trigger on. Set an interval for how many weeks should elapse before the next reminder, e.g., 3 for every third week.

- **Monthly:** Set a monthly reminder, triggering at the hour and minutes you set, e.g., daily at 9:35 AM. Set an interval for how many months should elapse before the next reminder, e.g., 1 for every month. Choose *Each* and set which days of the month you want a reminder, e.g., the 1st and 15th of the month. Alternately, choose *On the …* to choose a regular interval like the second Thursday of the month.

- **Yearly:** Set a yearly reminder, triggering at the hour and minutes you set, e.g., daily at 9:35 AM. Set an interval for how many years should elapse before the next reminder, e.g., 1 for every year. Choose which months you want a reminder. Also, choose *On the …* to choose a regular interval like the last day of those chosen month(s).

Alarm: Reminders are most useful when you have an alarm to, well, remind you of something. There are several alarms available for a reminder:

- **No Alarm:** —
- **Bounce Dock Icon:** Bounce the icon in the dock. This will only occur if DEVONthink is not the active application.
- **Display Notification:** Displays a notification using the Notification Center, appearing at the upper right of your screen. The message shown can be a combination of static text and placeholder text. It defaults to the *Name* placeholder. Control-click and choose *Insert Placeholder* to add additional placeholders. Note *System Settings > Notifications > DEVONthink >* must be enabled for this alarm to display. Notification are also only shown when DEVONthink is not the frontmost application.

- **Display Alert:** Displays an alert dialog when DEVONthink is or becomes the active application. If it's not frontmost, the dock icon will bounce until you switch to it. Like *Display Notification*, this contains static and placeholder text, and defaults to *Name*.

- **Speak Text:** Using the Mac's speech synthesis, this alarm will speak the specified static and placeholder text.

- **Play Sound:** Choose one of the system alert sounds found in *System Settings > Sound > Sound Effects*.

- **Send Mail:** Enter email addresses to which to send the matching items. This can be a comma-delimited list of addresses, names, or enter the name of a group you've defined in your contacts.

- **Add to Reading List:** Add the file to DEVONthink's Reading List.

- **Open:** Open the document in an a DEVONthink document window.

- **Open Externally:** Open the document in the system default application.

- **Launch URL:** Opens the URL associated with the document, if present.

- **Execute External Script:** Run a selected script. External scripts are stored in
  `~/Library/Application Scripts/`
  `com.devon-technologies.think3/`

`Reminders`. Add your own scripts to this location to make them available for use with reminders.

- **Execute Embedded Script:** Run an ad-hoc script written for the current reminder. Press the … button to display a popup prepopulated with a core script. Edit this and press the compile button at the lower left. Embedded scripts are only available to the reminder they are created in. If you want to use the same script with other reminders, use an external script instead.

As a bonus, reminder alarms will open databases containing the item when an alarm triggers.

> Note: When setting a reminder on multiple items, alarms are delivered individually. For example, an alert notification will show for each file, even if they were set for the same time.

If you are interested in the use of scripts in alarms, please refer to the Reminder Script chapter of the Automation chapter.

FINDER COMMENTS

Similar to the *Comments* in the *Get Info* pane in the Finder, the *Finder Comments* field can be used to store miscellaneous bits of information about the selected objects.

> Note: These comments will not appear in the files in the Finder unless the files are indexed or exported from the database.

ANNOTATIONS

This pane displays or allow you to create annotation files for a selected document. Annotation files are separate files where you can store notes about a specific document. These files can link back to the original file for quick access. Commonly used with PDF files, they can actually be used for making notes with any document in your database.

> Note: Annotation files are created in an *Annotations* group at the root of the database. However, you can move the file to another location, if desired.

If an annotation file doesn't exist, you can make one with commands from the down arrow in this section.

- **New from Template:** Opens a submenu containing three options: Create an Annotation file from the default template, choose a custom template added to DEVONthink's internal Annotations folder, or open the Annotations folder to access any custom templates you've added.
- **New from Clipboard:** Choose this option to create an annotation with content from the clipboard.
- **Insert Back Link:** This inserts a back link to the original file into a new annotation file. If no annotation file exists, one will be created with this command.
- **Insert Quote:** This inserts both the selected text and a backlink to the page or paragraph in the original file. If no annotation file exists, one will be created with this command. This option is only supported by PDF, plain text, and rich text documents.

If an annotation file is detected by DEVONthink or you've just created one, an editable preview of the file will appear here. Clicking the down arrow reveals these options:

- **Open:** Open the annotation file.
- **Reveal:** Reveal the annotation file in its current location.
- **Insert Back Link:** Insert a link back to the original document in the current annotation file. With audio and video files, the back link will include the current playback time. With multi-page PDFs, the back link will include the current page .
- **Insert Quote:** Inserts selected text an a link to the current page.
- **Insert Summarized Annotations:** Inserts a summary of the document's annotations, similar to what is produced via the *Tools > Summarize Annotations* commands. The format of the summary is dependent on the format of the annotation file.
- **Export:** Exports the current annotation file to the Finder in one of these formats: PDF, rich text, plain text, or Word (.doc) formats.
- **Remove:** Moves the annotation file to the database's *Trash* and removes the reference from the original document.

Creating an Annotation File: DEVONthink has a built-in default annotation file in rich text format, suitable for general use. However, you can create your own custom template in plain text, rich text, or Markdown formats. These files can be created externally and added to `~/Library/Application Support/ DEVONthink 3/Annotations.noindex` or created in DEVONthink and exported via *File > Export > as Template* to the `Annotations.noindex` folder.

To create backlinks to the original file, there are two placeholders for use in the body of your template:

- **%documentName%:** Resolves to the name of the original document.
- **%documentLink%:** Resolves to the item link of the original document.

Rich Text: To create the backlink in a rich text template, use the `%documentLink%` placeholder and the document name will be added as the link's text.

Markdown: To create the backlink in a Markdown template, use the form: `[%documentName%](%documentLink%).`

Plain Text: Since plain text files don't support live links, you can use *WikiLinks* to create a backlink. For example, if you are using the *Square Brackets* WikiLink syntax, you could use `[[%documentName%]]` in the body of the plain text.

CONTENT
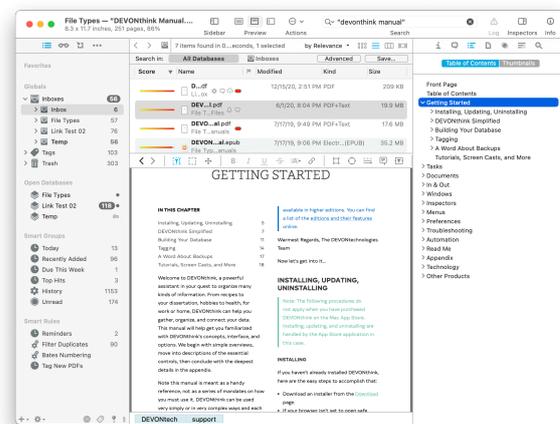
Navigating PDF documents can sometimes be difficult when you are just scrolling through endless pages of documents. The *Content* Inspector shows two views, similar to what you see in Apple's Preview application: *Table of Contents* and *Thumbnails*.

TABLE OF CONTENTS

The *Table of Contents* displays the structure of certain document types. View the outline of a PDF document, provided that PDF contains one, section headings of Markdown documents, or emboldened or underlined lines in rich text files. Click on the disclosure triangle to show or hide sections within chapters. Click on any section heading to jump directly to the beginning of it.

For even quicker navigation, the table of contents can be navigated via keyboard, using the arrow keys to move around.

There are two context menu items in the *Table of Contents* view: *Copy Page Link* for use with PDF documents, and *Copy Section Link* for use with Markdown documents.

THUMBNAILS

The *Thumbnails* view shows a list of thumbnails, one for each page in the document. This allows for a more visual approach to moving through your document. By default, the thumbnails are shown in a single column but they can be displayed in multiple rows if the sidebar is expanded. This view allows for actions like these:

- Jump to or select any page by clicking on it. Extend a range of selected pages by holding the ⇧Shift key to select consecutive pages. Hold the ⌃ Control key to select non-consecutive pages.
- To quickly remove unwanted pages, press the ⌫ Backspace key.
- If you want to reorder some pages, select the page(s) to move and drag and drop them within the thumbnails. A blue line

will appear at the place the pages will be inserted. This will also work if you drag thumbnails from one PDF to another.
- Drag selected pages to another location in your database and DEVONthink will create a new PDF containing only those pages.

You also have several options available in the context menu when you Control-click in the *Thumbnails* view:

- **Cut/Copy:** Cut or copy the selected page(s) to be pasted into another PDF.
- **Copy Page Link:** Copies a URL to the clipboard pointing directly to the current page of the document.
- **Reverse Page Order:** Reverse the page order of the document.
- **Split Document:** Splits the document at the current page. A new document is created from the preceding pages and removed from the current document. This item is unavailable when the first page of the document is selected. Also, note this action cannot be undone.
- **Insert Blank Page:** Insert a new blank page.
- **Delete Selected Page(s):** Delete the selected page(s).
- **Rotate Left/Right:** Rotate the selected pages left or right.
- **Select/Deselect All:** Select or deselect all pages in the document.

DOCUMENT
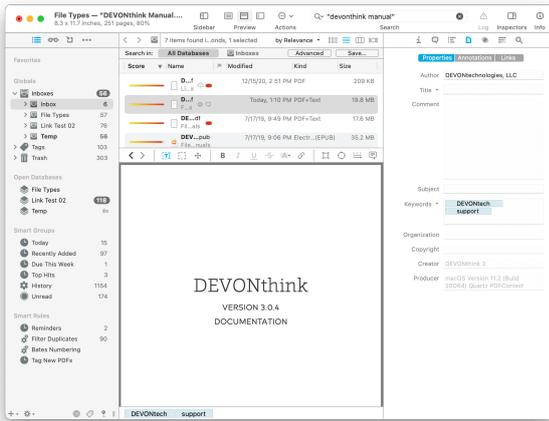
The *Document* inspector provides specific information about the current document. This information is presented in four specialized views: annotations, e.g., highlights in a PDF, attachments like images in `.rtfd` files, detected links in the document, and other documents mentioning the name or an alias of the current one.

ANNOTATIONS
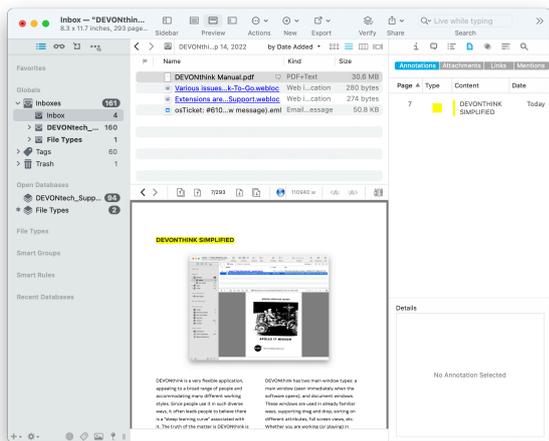
As PDF files are often used in DEVONthink, annotating these documents is commonplace. The *Annotations* view displays a listing of the annotations in the current document. Each annotation is listed with

the following metadata: page number, type, content or author, and the date the annotation was made. In the case of highlights, text, or note annotations, the content will be displayed. With graphic annotations, e.g., rectangle or ovals, the author will be displayed. The list can be sorted by clicking the appropriate header. Select an item in the list to switch to the proper page. The annotation on the page will be selected. This makes it easy to navigate via the document's annotations.

At the bottom of the view is a *Details* section. For *Note* annotations, this will show the text of the annotation. Details can be added to other annotation types as well, but only supports plain text entries.

Opening the context menu in the *Annotations* list offers the following options:

- **Copy:** Copies the metadata and any text in the Details to the clipboard as plain text.
- **Copy Page Link:** Copies a URL to the clipboard pointing directly to the current page of the document.
- **Delete:** Delete the current annotation.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

ATTACHMENTS
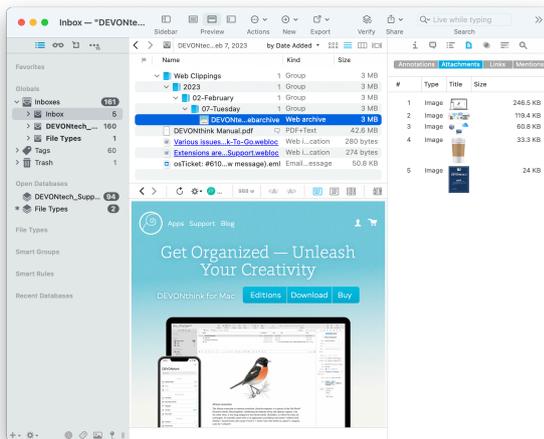
This inspector displays any attachments or linked images of the current document. For example, in a rich text with attachments, `.rtfd` file, you can see and access the attachments individually. Selecting the attachment will select it in the document. Drag and drop an attachment to export it to another location. This inspector also works with Markdown, bookmarks, and HTML-based files, e.g., formatted notes.

Opening the context menu in the *Attachments* list offers the following options:

- **Open:** Provides options to open the attachment in DEVONthink, tabs, or even the system default browser, depending on the current document and its underlying link.
- **Copy / Copy Name:** Copy the attachment as a file or just its name.
- **Add to Downloads:** Add the attachment to the Download Manager. Available when viewing linked images in web content.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

LINKS
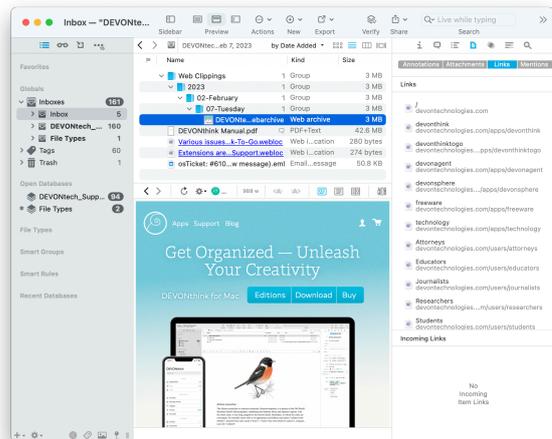
For the selected document, DEVONthink will attempt to determine if it contains links. These may be web URLs, file URLs, item links, and even DEVONthink's WikiLinks. (You may be surprised by the number of links in many documents.) The top section of the *Links* view displays a list of any outgoing links, i.e., links to other files, websites, etc. The bottom *Incoming Links* view shows incoming links, i.e., links in other files to the current document.

Select a link in the list to show it in the view/edit pane. Double-click a link to open it in a document window or an external application. Option-click or Shift-Option-click a link to open it in a new tab. Opening the context menu in the *Link* list offers the following options:

- **Open:** Opens the link in an external application.
- **Open in Tabs:** Opens the link in a new tab, when possible.
- **Copy:** Copies the URL to the clipboard
- **Delete:** Deletes the link and the text.
- **Select/Deselect All:** Quickly select or deselect the items in the list.

In the *Incoming Links* section, the context menu has an extra command: *Copy Name*. Use this to copy the name of a linked file and paste it into another document as a WikiLink.

MENTIONS
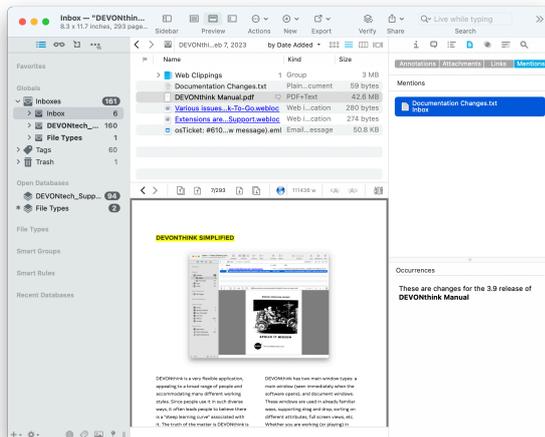
This inspector is similar to the *Incoming Links* pane of the Links inspector, however it lists all mentions - linked or not- in a selected document. Mentions are content matches in other documents, based name or alias of of the selected item. This inspector can be useful both for writing and researching to view mentions, especially for those not using automatic Wiki linking. Finally, unlike the incoming links inspector, this inspector supports mentions in any document type, e.g., PDFs.

Selecting a mention shows a summary of the occurrences in the lower pane. Documents with mentions can be opened via a double-click or the context menu or revealed. Also there are some copy functions in the context menu: *Copy* copies the item link, *Copy Name* copies the file's name, and *Copy Summary* copies the summary for the selected document..

CONCORDANCE

The *Concordance* pane, opened in the *Tools > Inspectors* menu, gives you a tool for analyzing the textual contents of documents. When the inspector is open, selecting different items will show varying results. If one or more documents is selected, the results will be inclusive of the text in all of them. If there is no selection, the results will be based on the text of documents in the current location, whether a group or a database. This also applies to selecting items matched in smart groups, both local and global.

These results are presented in three distinct views: *List*, *Cloud*, and *Graph*.
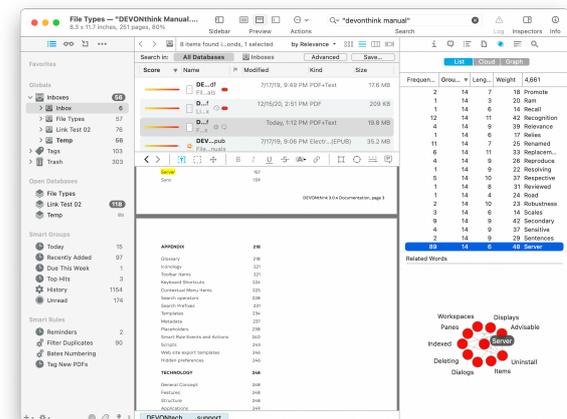
LIST

The *List* view displays the concordance results in a list, separated by these parameters:

- Word frequency
- Number of groups with items containing a specific word
- Word length

- Word weight (relevance, depends on the contents of the database)
- Alphabetical listing

Click the column headers to sort on a given parameter. Select a word in the list to highlight all occurrences in the current document. Double-click a word to open a database-wide search for the term.

CLOUD
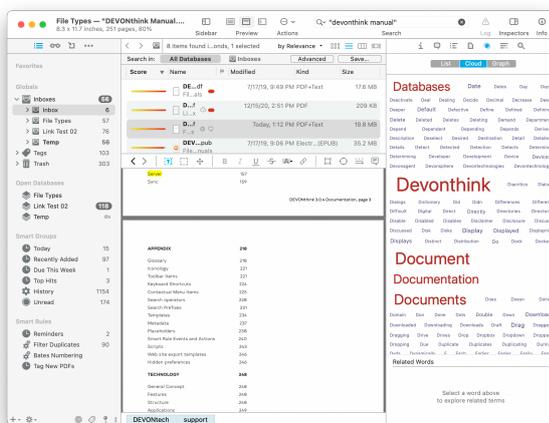
The *Cloud* view present the concordance as a word cloud. The size of the terms is relative to the frequency in the selection or database. Selecting terms highlights the occurrences in the current document. The context menu
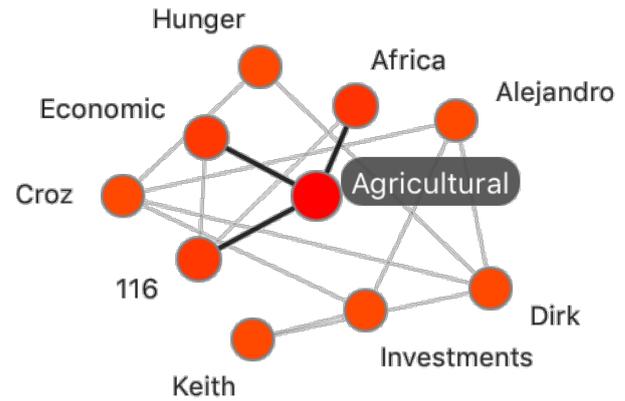
Of special note is the *Related Words* graph shown under the *List* and *Cloud* views. Select a word in the list or cloud and it becomes the central term in a graph of related words. These are words found throughout your database. Double-clicking a node initiates a database-wide search. The context menu provides options for copying the word's information, as well as excluding the word. Additionally, use the *Export* command to create a PDF of the graph.

CONTEXT MENU

Opening the context menu in the List or Cloud sections offers these options:

- **Copy:** Copies the values for the selected word to the clipboard.
- **Add to Tags:** Adds the selected word(s) as a tag to the selected items.
- **Select/Deselect All:** Quickly select or deselect the items in the list.
- **Exclude/Include Word:** Use this to define stop-words or to include them again.
- **Show/Hide Excluded Words:** Select this to show or hide any excluded terms. Excluded terms will shown with a strikethrough.

- **Export:** When used with the word list in the *Cloud* inspector, exports a PDF of the word list.
- **Sort:** Sort the word cloud *by Name* or *by Count*.

GRAPH

The frequency graph shows a graph of the word frequency over the rank number of the word (see above).

> Note: There are no context menu options in this view.

SEE ALSO & CLASSIFY
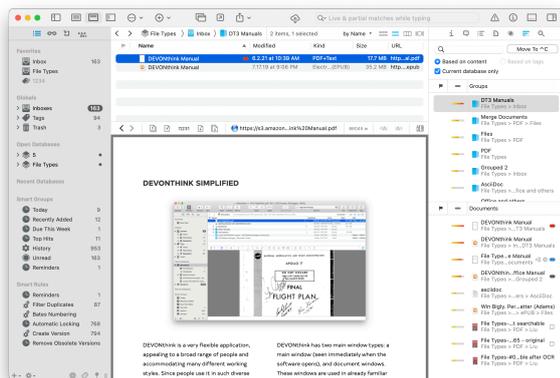
The *See Also & Classify* inspector is the main interface to DEVONthink's brain, our built-in AI engine. This engine is analyzing the contents and locations of all documents in your database and making connections between them. These connections can be seen in this inspector pane.

This inspector will be shown when a document is selected and you choose *Tools > Inspectors > See Also & Classify*. When the inspector opens, you will be presented with two sections: *Classify* and *See Also*.

GROUPS

Based on analyzing the contents of the current document, the AI cross-references the contents and locations of other files in the database. The results are shown in the *Groups* section. This list offers a range of suggested locations, displaying a heat-mapped score of its relevance and the location of the group. The highest ranked suggestion is presented first. Obviously, you can choose any other them. If there's a group you'd like to use, double-clicking the suggested group will file the document for you. You can also click the *Move to* button, press ⌃C, or drag and drop to file it in any of the suggested groups. Lastly, if a suggested group is in the same database as the selected file, you can hold the ⌥ key and the *Move to* button changes to a *Replicate* button.

Directly above the classify results is a search field. If there is another group you're thinking of that hasn't been suggested, type part of the group name to filter the list of suggestions. Then file into the location of your choice.

Below the search field are two options to help focus the results presented in the two panes: *Based on content*, enabled by default, makes its suggestions based on content comparisons, while *Based on tags* uses only the documents tags for matching. Since results can be shown for all databases, *Current database only* restricts the suggestions to the active database.

On a related note, in the Data menu, you will find two menu items: *Move to … again* and *Classify to…*. The first provides you the option to classify the current document in the group

into which you classified. If you filed into a particular group via the *Groups* section, this menu item would remember it and offer that group as a place to classify the current document. The second menu item offers its top ranked suggestion for classifying the current document, if you'd like to just follow the AI's suggestions.

DOCUMENTS

Another benefit of the AI's content analysis is the ability to offer suggestions of documents that may be related to the current document. These files are listed in the *Documents* section of the inspector. Like the *Groups* section, this list shows the location of the document and heat mapped score of the potential relevance. Hovering over a result shows a tooltip displaying its full title and location.

Select a document in the results to display it in the view/edit pane. For your convenience, DEVONthink always lists the original document near the top of the list. This way you can select it to go quickly back to the original document. Double-click a document to open it in a document window. Drag a document from the list to move it to another location. When dragging, you can create duplicates by holding the ⌥ Option key. You can also create replicants by holding ⌘ Command and ⌥ Option and dragging to another location in the database.

CONTEXT MENU

The See Also and the Classify sections host many of the same context menu items as the item list. A list of these commands is included in the context menu section of the appendix. Also an alternative command is available when holding the ⌥ key: *Reveal in New Window*.

SEARCH
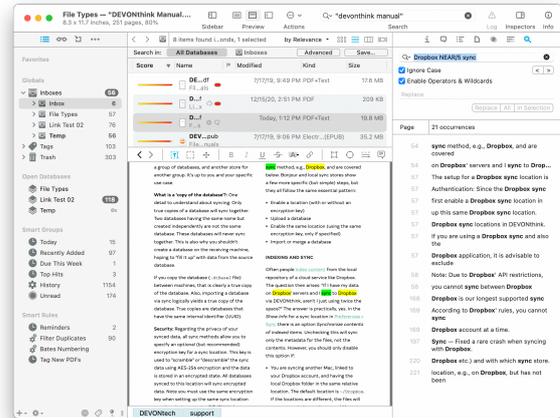
The *Search* inspector provides in-document searching. Using the same familiar ⌘F hotkey you use in most macOS application, you can not only search, but replace found words. Additionally, DEVONthink provides a list of the found words to help navigate the results. The results also show the search hits in context, either in a sentence or paragraph, depending on the setting in .

Searches match substrings by default. This means a search for "some" would also match "something" or "worrisome".

Something you may find useful is the live updating when you select other files. If you search for a word in the current document and leave the *Search* inspector open, DEVONthink will automatically search newly selected files.

SEARCH AND REPLACE

The *Search and Replace* section offers these simple intuitive controls:

- **Find:** Enter the word(s) you'd like to search for. Note this matches substrings be default, so entering "word" would match "words" and "wording" as well. Use spaces before or after the word to treat it as a full word.
- **Ignore Case:** Ignores case-sensitivity when searching.
- **Enable Wildcards and Operators:** Allows using wildcards and operators, e.g., `DEVONthink NEAR sync`. If this option is enabled, the *Edit > Find > Find Next/ Previous* commands and next/previous buttons in the inspector are available.
- **Previous/Next Arrows:** Use these arrows to cycle backward and forward through the highlighted results.
- **Replacement Text:** Enter replacement text, as desired. Note this field is only enabled when you have editable text in the current document; e.g., rich text or a Markdown document in editing mode.
- **Replace:** Replace the currently highlighted word and move to the next search hit in the document.

- **All:** Replace all occurrences of the found word.
- **In Selection:** If you make a selection in the text, you can replace all occurrences of the found word in that selection.

SEARCH RESULTS

The results provide a convenient list of the found words. This includes the line number of each hit and the number of occurrences found. It also includes part of the surrounding text to help give some context to the found words. Additionally, there a some context menu options available when you Control-click in the results:

- **Copy:** Copies the paragraph fragment selected. You can optionally drag and drop this fragment into the database or another compatible document.
- **Copy Paragraph/Page Link:** Copies a link to the current document, but appends a parameter pointing to the selected paragraph for rich text files or the page for PDF documents.
- **Add to Favorites:** Adds the current document to the *Favorites*.
- **Add to Reading List:** Adds the current document to the *Reading List*.
- **Select/Deselect All:** Selects all or none of the items, respectively.

MENUS

IN THIS CHAPTER

A complete listing of all the commands available in the menu bar of DEVONthink, the *Services* menu, and the context menu of the DEVONthink's *Dock* icon.

THE APPLICATION MENU

The *DEVONthink* menu is a utility menu, similar to those found in other Mac applications. It has commands that allow you check the version via the splash screen or check for application updates. You can install our add-ons, access the preferences, access the *Services* menu, empty your databases' Trash, and quit the application.

ABOUT & CHECK FOR UPDATES

About DEVONthink: Shows information about DEVONthink including the version number to whom the software is registered.

Check for Updates: Checks if updates for DEVONthink are available. By default, DEVONthink checks for updates automatically, however you can change the update settings in the *Settings > General*. If an automatic update is pending choosing this command shows a window with additional information about the update.

> Note: When checking for updates no information is uploaded from your computer to the DEVONtechnologies server. DEVONthink only downloads a file listing the most current versions to your Mac. This option is not available if you have purchased DEVONthink from the Mac App Store. In this case, all updates are handled by the App Store.

ADD-ONS

This command allows you to install, or reinstall, some of our extra support files and scripts.
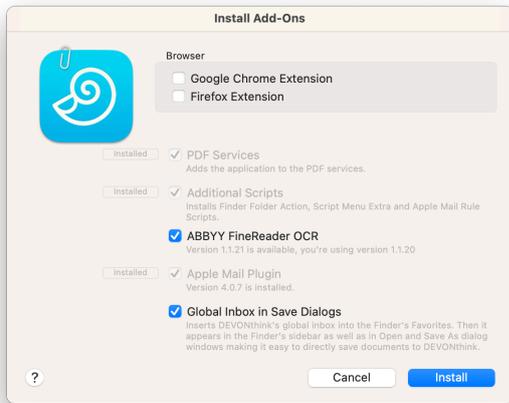
The following options are available.

- **Google Chrome Extension:** Opens the Chrome Web/Store page in Google Chrome where you can install the browser extension. You have to do this manually and follow Google's rules.
- **Firefox Extension:** Opens the Mozilla Add-Ons page in Firefox where you can install the Firefox add-on (similar to the Safari extension). You have to do this manually and follow Mozilla's rules.
- **PDF Services:** Adds *Save PDF to DEVONthink* to the PDF menu of print dialogs. This allows you to print a PDF directly to DEVONthink.
- **Additional Scripts:** Installs the mail rule scripts for Apple Mail, Folder Action scripts, and Menu extra scripts.
- **Global Inbox in Save Dialogs:** Inserts DEVONthink's Global Inbox into the Finder's sidebar and all "Save As" dialog windows. Use it to save directly to the inbox from any application. Note: The name

of the inbox is "Inbox" regardless of your computer's language preferences.

- **ABBYY FineReader OCR:** Installs the ABBYY Finereader OCR resources for use with images and PDFs with no text layer.
- **Apple Mail Plugin:** A plugin for Apple Mail that allows you to archive messages or whole mailboxes directly from within Mail. On Mac OS Mojave you'll have to manually activate the plugin after installation. In Apple Mail visit *Settings > General > Manage Plug-ins* and activate DEVONthink's plugin.

> Note: The Safari browser extension is now installed by default, but you'll need to go into Safari's *Settings > Extensions* and enable it. Also while extensions for browsers like Opera, Vivaldi, and Brave are not explicitly available, it is possible to install them from the Chrome Web Store, while in those browsers.

SETTINGS, TRASH, CACHE

Settings: Opens the application *Settings*.

Empty Trash: Moves the contents of all open databases' trash to your computer's file system trash.

Empty Cache: Empties the web browser cache. This frees up space and makes sure that all, when displaying a web page, all data is freshly loaded instead of using a cached copy.

PURCHASE & LICENSES

Purchase: Opens the DEVONthink product page from where you can put the app into your shopping cart. If this copy of DEVONthink is already licensed, you will be presented with upgrade choices.

Enter License: Enter your purchased license code here. It is best to use copy-and-paste for transferring the license code from the email message to the appropriate field.

> Note: *Enter License* changes into *License* and *Purchase License* into *Purchase License or Upgrade* as soon as you have entered a valid license code (and a paid upgrade exists). Available options depend on whether you have purchased your copy from DEVONtechnologies or from the Mac App Store.

SERVICES

The *Services* submenu gives your access to special commands published by other Mac applications such as TextEdit or Safari, or by services extensions such as our own WordService or CalcService. Also, DEVONthink publishes its own services. See also p. 140ff

THE FILE MENU

The File menu contains commands creating and deleting databases. There are options for adding or exporting files, as well synchronizing them. Additionally, if you need to do database maintenance, you will find those commands here.

NEW & OPEN

New Database: Creates a new database in the selected location.

New Encrypted Database: Creates an AES-256 encrypted database file at a user-specified size. Technically this database uses an encrypted disk image but will not be visibly mounted in the Finder. Obviously, when you enable Spotlight for the database the data that Spotlight needs to store will not be encrypted. The anticipated size of the database can be specified in megabytes *(MB)* or gigabytes *(GB)*.

Open Database: Opens previously created databases. You can select multiple databases.

Open Recent: Presents a list of recently used databases, which gives you quick access to your frequently used databases. Choose *Clear Menu* to remove all items from the menu.

New Window: Opens a new main window for the selected database.

IMPORT & EXPORT

Import: The *Import* submenu contains various options for importing data, e.g.,selected files, bookmark, contacts, and some data from compatible applications. Some options will import files into their own special groups at the root of the database.

- **Files and Folders:** Imports selected files or folders. Files will be imported to the

current location. Finder tags and Spotlight comments will be imported.

- **Bookmarks:** Imports bookmarks from [DEVONagent Pro](), [Firefox](), [Google Chrome](), or Safari as bookmarks. Bookmarks are imported into a newly created group bearing the name of the chosen browser. Only new bookmarks are imported if you use this command again.

- **Bookmarks from HTML file:** Imports bookmarks from an HTML file, e.g., one exported from some web browsers' bookmarks.

- **Contacts:** Imports Apple Contacts addresses selected in the import dialog into a newly created group named "Addresses". Contacts can be imported as a sheet, as vcards (`.vcf`), or as bookmarks. Previously created groups are reused.
  Tip: To import all addresses, select all addresses in the group "All" and import them. Address card bookmarks link to the original card in the Contacts application.

- **Folders & Attachments from Notes:** Imports your notes from Apple Notes.

- **Items from Yojimbo:** Imports all items from [Yojimbo]() into a newly created group named "Yojimbo". Imported items retain their name, label, flag, URL, comments, tags and creation/modification dates. Items without a URL link back to the original item in Yojimbo.

- **Notes from Evernote:** Imports selected notebooks from an import dialog into a newly created group named "Evernote". Tags, dates, and URLs should be preserved. OCR text is also imported if present in the data. Notes are stored as formatted notes. This option requires the Evernote application to be installed.

Note: The import from Evernote command only works with Evernote's "legacy version" as Evernote 10 no longer supports AppleScript. However, you can export notebooks to importable `.enex` files from within Evernote. Exporting individual notebooks is suggested.

- **Images (with OCR):** Imports images and applies optical character recognition (OCR) to create a searchable PDF. This makes all written text searchable and available to DEVONthink's AI functions. You can change the setting in *Settings > OCR*.

- **References from Bookends:** Imports selected collections from the presented dialog into a newly created group named "Bookends". Already imported references are updated. The keywords assigned to a Bookends reference are added to the *Document Properties* of the created rich text document. Use the optional script *Scripts > Tags > Convert keywords to tags* to convert the keywords to tags if needed.

- **Unix Mailbox:** Imports Unix mailboxes, like those exported from [Thunderbird]().

- **Website:** Opens the [Download Manager]() and downloads a complete web page/site for archiving and offline viewing. Make sure the [download options]() are set correctly, especially the options that define which links DEVONthink should follow (if any). All links within the site are modified so that they point to the downloaded images or other embedded objects. This ensures that the page/site can be displayed at any time. By default, groups created by

the *Download Manager* are excluded from tagging.

- **Scan from ScanSnap:** Scans a paper document using an attached Fujitsu ScanSnap scanner.

> Note: Groups created when importing bookmarks, contacts, email messages, and items from Evernote or Yojimbo are not automatically excluded from classification and tagging. This makes it easier to classify them later.

Export: The *Export* submenu presents options for exporting selected documents or groups to the file system. In addition, the *Export* menu provides export methods based on plugins. DEVONthink comes with a number of standard plugins for exporting documents in different formats. For these formats, the export creates a single merged document when multiple files are selected.

- **Document:** Exports the currently viewed document in its native format. For images exported from a separately opened document window, DEVONthink lets you choose the desired file format or image quality; e.g.,you can export a PNG files as a JPEG file.

- **Files and Folders:** Exports the selected documents in their native format. Groups are exported as Finder folders, preserving the group structure you have built in DEVONthink. DEVONthink tags are applied as Finder tags to the exported files. Internal metadata for the items is preserved in `.DEVONtech_storage files` in the exported folders. These files are used for reimporting into DEVONthink. If you will not be reimporting the exported

files, you can safely delete those files. Be aware the addition date of reimported items will change, if that is a critical piece of metadata for your database.

- **OPML:** Exports the selected items as one OPML file.

- **PDF Document:** Exports the selected items as a paginated PDF. Hold the ⌥ Option key to change allow the command to *PDF Document without Annotations*.

- **RTF/RTFD Document:** Exports the selected items as one merged rich text file without embedded items (RTF) or with them (RTFD).

- **Text:** Exports the selected items as one merged plain text file.

- **Word 2007/97 Document:** Exports the selected items as one merged Microsoft Word `.docx` (Word 2007) or `.doc` (Word 97) document.

- **Website:** Exports the selected items as standalone web site that you can upload to your web server and share with colleagues. In the presented dialog window, choose the desired template, text encoding, and whether DEVONthink should convert diacritics and accented characters to HTML entities or not. Check *Create Index Pages* to create `index.html` pages with cross-links to all included documents. Markdown and formatted notes are rendered to HTML, other file types that cannot be displayed in a web browser, e.g., Pages files, are converted to PDF if possible. Cross-links are converted correctly. For the export templates are used that you can modify yourself.

- **HTML Bookmarks:** Export the URLs of all selected items and their children as an HTML bookmarks file.

- **Template:** Saves the selected documents as a template, which can then be used to quickly create new documents using *Data > New from Template*. Export multiple documents and/or groups at once to create e.g.,a project template. *Data & New from Template & Open Template Folder;* can be used to organize templates.
- **Database Archive:** Creates an optimized ZIP file of the current database in the selected location. This can be useful as a secondary backup strategy. Note: When used with an encrypted database, the database will be compressed in an unencrypted state.
- **Metadata (JSON):** Export the metadata of the selected items as JSON data.

- **Unix Mailbox:** Exports all selected email messages and saves them as Unix mailbox file that can be imported into other email applications. Note this only applies to exporting native email (`.eml`) files, not files that have been converted to other formats, like plain or rich text.

Share: This shows the standard Mac share menu.

INDEX AND UPDATE

Index Files and Folders: Link to files in the Finder, leaving them in the current location. See the In & Out > Importing & Indexing section for important information on indexing.

Update or Refresh: This command dynamically changes, relative to what is currently selected.

- **Update Indexed Items:** Force DEVONthink to check for filesystem events and newer file dates on indexed items, and update them as needed. This is often used when indexing cloud-synced locations, e.g., folders in Dropbox, or when indexing items on networked volumes, as some volumes don't reliably support filesystem events.
- **Update Items:** Similar to *Update Indexed Items* but works with imported items. Sometimes used after editing documents in external applications when the application or the database is closed. It may also be needed when accessing a database stored on a networked volume.
- **Refresh Feed:** Manually refresh selected RSS feeds.

SYNCHRONIZE

Synchronize: Synchronizes the selected database with all its locations. Note, this command will be disabled if the current database has no active synchronization. Holding the ⇧Shift key shows the *Synchronize All* option to synchronize all actively syncing databases.

Download Pending Files: Downloads the files of selected documents if they are available through one of the database's locations. Only necessary if none of the database's locations is set to synchronize indexed files.

DATABASE PROPERTIES & CLOSE

Database Properties: Opens the *Database Properties* popup for the current database. This panel presents a few options, statistics

about the database, and allows you to change the displayed name, add comments, and add a username and password.

Close Database: Closes a selected database. If multiple databases are open, use *Close All* to close them all at once. If you'd like to keep the current database open but close the others, use *Close All Except*. Note that closed databases will not reopen on launch. Only databases that were open when DEVONthink quits will reopen on the next launch.

DATABASE MAINTENANCE

Like any database, DEVONthink databases need a bit of maintenance from time to time. All the commands you'll need for this can be found here.

Verify & Repair: Verifies all database structures and repairs them if possible. By default, DEVONthink automatically verifies the database structure every time you open a database. If it finds significant errors, DEVONthink will advise you to run this command.

Use this command whenever you feel it is necessary. If you're a heavy user of DEVONthink, running a Verify & Repair once a week or more often is a good idea.

Check File Integrity: Verifies the stored checksum for each file in the database. The results are reported in the *Log* window or popover. Note: If you are indexing files and they have not been updated, they will report a checksum error. See also p. 54ff

Optimize Database: Creates an internal backup of the database and then optimizes the database structure. Optimizing removes unnecessary internal elements from the database and rebuilds the internal structure to optimize performance. DEVONthink also creates internal backups on a regular basis. Hold the ⌥ Option key to display the *Restore Backup* option. This allows you to roll back the metadata to a previous date. This option would only be used in troubleshooting situations.

Rebuild Database: Completely rebuilds the database by exporting all items to a temporary folder in the file system, creating an empty database, and reimporting all items. This removes any structural problems. Depending on the size of your database, this can take from a few seconds to several hours. This option is typically only used in a troubleshooting situation.

Delete Database: Closes a selected database and moves it to the Finder trash.

> Note: For more information on database issues, including reports in the Log window or popover, see the Repairing a defective database section.

PRINT

Page Setup: Sets your preferred page size and printer settings.

Print: Prints the current document or view.

THE EDIT MENU

The *Edit* menu contains all commands and options relating to editing. You'll find the classic Mac cut/copy/paste and find/replace commands here, as well as many more.

UNDO, CUT/COPY/PASTE, …

Undo/Redo: Use these commands to undo or redo the last action, e.g.,to undo deleting a file. *Undo* and *Redo* work for most actions.

Cut/Copy/Paste: Cut, copy, or paste as standard behavior.

Copy with Source Link: Copies selected text and a link to the current document. This text and link can be pasted into other applications.

Copy URL: Copies the URL of the selected or frontmost document to the clipboard.

Copy Item Link: Copies a URL to the clipboard that links to the selected document or group. These links can be used to create a back link to the document in applications that support live hyperlinks. For PDFs, hold the *Shift* key to reveal alternate item links. If a thumbnail is selected, *Copy Page Link* is available. If text is selected, *Copy Selection Link* will appear. If an annotation is selected, *Copy Annotation Link* will be shown. With selected content in text documents, *Copy Paragraph Link* will appear as the alternate command.

Paste with Source Link: When copying text from files in DEVONthink, use this command to paste the text in rich text and Markdown documents with a link back to the source document.

Paste and Match Style: Pastes text from the clipboard, matching the styles in the current document.

Delete: Deletes the selected piece of text.

Complete: Tries to auto-complete the partial word before the insertion caret. This standard Mac function uses the currently active dictionary, chosen in the language dropdown of the *Spelling and Grammar > Show Spelling and Grammar* panel.

Select All/Deselect All: Selects or deselects the complete content of the frontmost document. Hold the ⇧Shift key to reveal the *Deselect All* option.

SUMMARIZE, TAGS, SET NAME

Summarize: Summarizes the selected piece of text. Unlike the Mac's *Summarize* service, this command takes advantage of the built-in AI of DEVONthink, and uses the complete "knowledge" contained in the open databases for improving the results. The better your databases, the better the results.

Tags: Use this command to quickly enter tags for the current document. This displays the *Tag bar*, if necessary.

Set Name As: Applies the selected text as the document's name.

FIND, SPELLING, INSERT

Find: This submenu contains standard Mac find commands, like those available in TextEdit. Searches on the current document are displayed in the Search Inspector. Two commands of note are:

- **In Database:** Brings the search field of the frontmost window into focus.
- **Scroll To Selection:** In long documents, this command scrolls the current document to selected text.

Spelling and Grammar: Provides the standard macOS functionality for checking text for spelling or grammar errors. To choose the language used for spell checking, or for auto-completion (see above), open the spell checker panel with *Edit > Spelling and Grammar > Show Spelling and Grammar* and choose your language of choice from the pop-up menu.

Substitutions: Shows the standard *Substitutions* preference panel and switch the available options manually on and off: *Smart Copy/Paste*, *Smart Quotes*, *Smart Dashes*, *Smart Links*, *Data Detectors*, and *Text Replacements*. *Data Detectors* analyze shown text and make context-sensitive actions available, e.g., when you hover the cursor over a phone number or postal address.

> Note: The *Spelling and Grammar* and *Substitutions* commands can be temporarily applied to the current document. If you'd like these to be persistent choices, you can make global changes in *Settings > Editing*.

Transformations: Use this submenu to change selected text to all lowercase or uppercase, or to capitalize every word.

Speech: Starts or stops speaking the selected piece of text.

Insert: Inserts items, like pictures, checkboxes, bulleted lists, etc. The options available are dependent on the current file type.

DICTATION & EMOJIS

Start Dictation: Starts the Mac's dictation function.

Emoji & Symbols: Shows the standard *Special Characters* panel for inserting characters and emoji that you cannot enter directly with your keyboard.

THE DATA MENU

The *Data* menu contains all commands that deal directly with documents or groups. Here you'll find commands for creating, labeling, classifying or group new documents, and more.

NEW DOCUMENTS & TEMPLATES

New: This submenu provides access to the built-in items DEVONthink allows you to create.

- **With Clipboard:** Creates a new document based on the contents of the clipboard. Note: Some applications such as Microsoft Word put data in multiple formats into the Clipboard. DEVONthink tries to use the most logical data when creating a new document.
- **Plain Text:** Creates a new plain text document.
- **Rich Text:** Creates a new rich text document.
- **Formatted Note:** Creates a new formatted note.
- **Markdown Text:** Creates a new Markdown text document.
- **HTML Page:** Creates a new HTML page. You can use the built-in macOS WYSIWYG editor to edit the HTML page or switch to

its source code (from the navigation bar) and edit it directly.

- **Sheet:** Creates a new sheet. Add columns to the new sheet by using the + button or by pressing the ↵ Return key. Name the columns and sort the sheets by dragging them with the mouse. Click *OK* to create the new sheet.
- **Bookmark:** Creates a new bookmark. Type the URL and optionally name it to create a bookmark, just as any browser does. If you don't type in a name, DEVONthink will set one automatically.
- **Feed:** Creates a new RSS feed document. The feed behaves like a special type of group that contains RSS entries published by the feed's author. Type the URL and optionally enter a name. If you don't type in a name, DEVONthink will attempt to set one automatically. You can change the URL later by selecting the feed document and changing the URL field in the Info inspector.
- **Group:** Create an empty group. This option appears as *Tag* if you are currently in the *Tags* group of a database.
- **Smart Group:** Creates a new smart group. This is a special group that shows items matching your specified criteria, similar to the Finder's "Saved Search". DEVONthink opens the Smart Group Editor, which lets you define your search criteria. When saved, the contents are updated every time you display the smart group's contents.

New from Template: This submenu allows you to access any installed templates and add them to the current group in your database. There are two other commands to note:

- **Open Templates Folder:** Select this to open ~/Library/Application Support/ DEVONthink 3/Templates.noindex in the Finder. You can add your own documents to be used as templates here.
- **More Templates:** Opens the Extras section of the Support Assistant to install any available DEVONthink templates.

> Note: For more information on the pre-installed templates, check out the Templates section of the appendix.

OPEN, LAUNCH, REVEAL, SEND

Open: Opens the selected document or group in a separate document window. This command opens a second main window for the selected group. If you have selected multiple documents, hold the ⌥ Option key to display the *Open in Tabs* command. If the View/Edit pane is visible, this opens the selected items in new tabs. If the View/Edit pane isn't visible, a new document window will open with each selected document in its own tab in the window.

Open with: Displays a list of applications compatible with the current file type. Opens the selected documents in the chosen application. If your desired application is not listed in the submenu, choose *Other* to browse for it.

Launch URL: Opens the file, folder, or internet location indicated by the URL field in the Info inspector.

Reveal: Reveals the location of the frontmost document in either the same main window, if possible, or by opening a new one.

Show in Finder: Opens a new Finder window with the item selected. Note this only works for documents and indexed groups.

Send by Email: Creates a new message in the default email application and adds the selected items as attachments. Supported email applications are Apple Mail, Airmail 2, Microsoft Outlook, and Postbox, as well as some legacy email application . If the selected item is an email message, the sender is automatically inserted as the recipient and the text of the original message is inserted instead of an attachment. Notes: Postbox is currently only able to send one selected file. Unsupported email clients (e.g.,Thunderbird) can only send the plain text of one selected file.

SAVE, REVERT, DUPLICATE

Save/Save All/Revert To Saved: Saves the frontmost document or all documents to disk. Hold the ⇧Shift key to show the alternate menu item, *Save All*.

Revert To Saved: Restores the frontmost document to the last saved version.

Duplicate: Creates a duplicate of the selected items. The name of the new item ends in "copy", and because their contents are identical both items are marked with the icon for duplicates (or, depending on your preferences, show their name in bold and blue).

MOVE INDEXED ITEMS IN AND OUT

> Note: The following two commands are only for use with indexed files.

Move Into Database: Use this command to move an indexed file into the database. Use this command with caution as it moves the file from its current location into the internals of your database. It does not copy the file.

Move To External Folder: Use this command to move a non-indexed item, e.g.,imported or created in DEVONthink, out to an indexed folder in the Finder.

FAVORITES, READING LIST, METADATA

Add To: Commands in this submenu add the currently selected documents to your *Favorites* or the *Reading List*.

Mark: Allows you to mark the item as flagged/unflagged, locked/unlocked, and read/unread.

Rating: Allows you to set a rating, from no stars to five stars.

Label: Allows you to mark the selected groups or documents with one of seven labels, just as in the Finder. You can define the color and the text of the labels in *Settings > Colors*.

Tags: This submenu offers special commands for tagging items.

- **Convert HashTags to Tags:** Converts hashtags into DEVONthink tags. The hashtag must be prefixed with the symbol and entered as a single word without spaces, e.g., `#software-rules`.
- **Convert Keywords to Tags:** Converts keywords, found in the *Document > Properties* inspector for PDF or rich text files, into DEVONthink tags.
- **Convert Properties to Tags:** Converts the *Author* property, found in the *Document*

> Properties inspector for PDF or rich text files, into a DEVONthink tag.

- **Convert Geolocation to Tags:** Converts geolocation data, if present on the document, into DEVONthink tags.
- **Add Vision Suggestions to Images:** Adds tags to selected images using Apple's machine learning technologies.
- **Scan Barcodes:** This option will attempt to detect a barcode in a selected image. A successfully detected barcode will be added to the custom metadata for the document. A list of barcodes detected with Apple's Vision framework can be found here..

> Note: The *Add Tags to Images* and *Scan Barcodes* options require macOS 10.13 or later.

CONVERT, OCR, THUMBNAILS

Convert: This submenu contains commands for converting between some file formats, e.g.,between rich and plain text. Note the options presented are dependent on the type of the selected document. Also, due to differences in the formats, any formatting in the source document may not be able to be perfectly preserved in the destination document.

OCR: This menu contains options for choosing an output format when doing OCR on a selected compatible document (JPEG, PNG, TIFF, PDFs with no text layer). The currently supported output formats are: *Searchable PDF*, *RTF*, *Word* , and *Web Archive*. Additionally, there are two special commands: *to Comment* and *to Annotation*,

which sets the Finder comment or creates an Annotation file with the text. Neither command alters the original file.

Thumbnails: Use these commands to add, remove, or update a thumbnail for the selected files.

GROUP & UNGROUP

Group Items: Creates a new group containing all the selected items. This is similar to creating a new group and moving the selected items into it. The alternate command *Group Similar Items*, shown when the ⇧ key is held, will attempt to file selected items with similar content in groups.

Ungroup Items: The exact opposite of *Group Items*. Moves all items in the groups one level up and deletes the now-deserted groups.

SEE ALSO & CLASSIFY

The following commands use DEVONthink's built-in AI to suggest good locations for the selected documents:

Move (to): This command allows you to quickly move other selected files to the last destination chosen in the See Also & Classify inspector.

Classify: Using DEVONthink's AI, this command will move selected files to the AI suggested location. This command is disabled if DEVONthink is not sure enough about possible destinations.

MOVE TO TRASH

Move to Trash/Move All Instances to Trash:
Moves the selected items to the trash. If
you have selected a replicated item, hold the
⌥ Option key and choose *Move All Replicants
to Trash* to move the selected item and all its
replicants to the database's trash.

THE FORMAT MENU

The *Format* menu contains the commands
and options dealing with all aspects of text
formatting. Here you'll find the standard font,
alignment, and ruler commands, as well as
very special DEVONthink commands.

> Note: Many commands in this menu
> only work with rich text, Markdown, or
> formatted notes. Plain text documents do
> not allow formatting. (That's why they're
> called "plain" text.) Some formatting
> options are also available for editable PDFs
> and web archives.

FONTS, STYLES, ALIGNMENT, RULERS

Font: This submenu is responsible for
controlling the font and the document
background color (rich text documents only).
Open the fonts panel with *Show Fonts*, then
increase or decrease the font size of selected
text with *Bigger* and *Smaller*, adjust the
text styles and the document background
color. Of special note are these two submenu
commands:

- **Copy Font:** Copies the font formatting of a
  selected piece of rich text.
- **Paste Font:** After using the previous
  command, applies the copied font to
  another selection of rich text.

Style: Commands in this submenu apply
a certain style, such as italics, bold, or
underlined, to selected text. Also, the
commands give you access to some high-
end font control like kerning, baseline
shift, ligatures, and character shape
(only applicable to Asian languages). One
command to take special note of:

- **Styles:** The *Styles* command opens the
  macOS styles editor. With it, you can step
  through all the styles used in the current
  document. If there's one you'd like to reuse,
  add them to your favorites. Use the pop-
  up menu to select a saved style and, if you
  don't need it any more, delete it. You can
  use saved styles from the ruler (see below).

Alignment: Align paragraphs left, right,
centered, or justified. Here, Asian or Arabic
users can also change the direction of writing,
if required.

Ruler: This submenu allows you to display
the ruler above the preview of rich text
documents. There are also two special
commands:

- **Copy Ruler:** Copies the current ruler
  attributes (tabs stops, indents, etc.) of a
  selected piece of rich text.
- **Paste Ruler:** After using the previous
  command, applies the copied ruler
  attributes to another selection of rich text.

HIGHLIGHTS

Highlight, Highlight Color: In rich text
documents, editable PDFs, and web archives
use *Highlight* to highlight a selected piece
of text just as you would using with a
colored pen on a piece of paper. To remove

highlighting, select the highlighted piece of text and choose *Highlight* again. Use the *Highlight Color* submenu to choose your favorite highlight color.

LINKS, SPACING, LISTS, TABLES

Make/Remove Link: Converts the selected text into an active link, or disables the link. This command can be used to create WikiLinks quickly.

Add/Edit Link: Use this command if you want to add a specific link to some text. If the text is already linked, the menu will display *Edit Link*, allowing you to change or remove the URL. The behavior you'll see when clicking linked text depends on the target of the link:

- If the text was a valid URL, the URL will be the target of the link. Editing the link text later does not change the target. Use the *Edit Link* command of the context menu to edit the link target.
- Otherwise, DEVONthink treats the link as a Wiki-style link. Clicking the Wiki-style link jumps to a document with exactly the same name as the linked text (or any document with a Wiki alias of that name). If there is no document of that name, clicking the link creates a new rich text document named after the linked text and pre-filled by the template you set in the *Settings > Editing*.

Spacing: This command allows you to adjust the line spacing of selected text in rich text documents. You can adjust the line height to an exact value or define a minimum and maximum height, adjust inter-line spacing, and define the space before and after a paragraph.

List: Creates a bulleted list. Select your prefix, bullet style, and suffix in the dialog sheet and click *OK* to insert a new list. In the list, press ↵ Return to insert new items, and press ⇥ Tab and ⇧⇥ Shift-Tab to indent/de-indent items, just as you would in any word processor.

Table: Inserts a new table into a rich text document and opens the table inspector panel. Use the table inspector to adjust the number of rows and columns, cell alignments, cell colors, border widths, and colors. Also, you can merge and split cells and create tables within a cell.

PLAIN & RICH TEXT, HYPHENATION, LAYOUT

Make Plain/Rich Text: Converts a rich text document to plain text and vice versa. Converting a rich text to plain text removes all formatting, while converting a plain text document to rich text applies default rich text font settings to the document.

Allow Hyphenation: Enables or disables hyphenation for the current rich text document.

Make Layout Vertical/Horizontal: Enables orienting and editing the document text vertically or horizontally.

Wiki Linking: Toggles whether to display WikiLinks in the current document.

Wrap Lines: Toggle whether to wrap a document's content to the width of the view/edit pane or document window, or let it exceed the width for sideways scrolling.

BARS, COLORS, INVISIBLE CHARACTERS

Show Formatting Bar: Displays a toolbar of formatting tools under the toolbar, providing access to styles, font and paragraph attributes, and lists. These tools are only used with RTF files.

Show Editing Bar: Displays tools above the current preview pane for some file types. For example, rich text formats display several common tools including increasing/decreasing font size, highlighting, toggling the ruler, and displaying the color picker are shown. For sheets, tools to add/remove/duplicate records, as well as editing columns are shown.

Show Colors: Shows the color panel, e.g., for changing the foreground color of selected text in rich text documents.

Show Invisible Characters: Toggles display of invisible characters such as spaces, tabs, and line feeds. Shown invisible characters appear in light gray.

THE TOOLS MENU

The *Tools* menu provides tools to get more detailed information about your documents, as well as some specialized commands.

INFO & FILTERS

Get Info: Opens an popup containing more detailed information about the currently selected file or group. It combines frequently used elements of the *Info* inspector and contains three panes:

- **Info:** The *Generic* panel shows basic information including name, aliases, URLs,

file dates, and kind. The *Custom* pane shows metadata specified in *Settings > Data* that has been applied to the file.

- **Annotations & Reminders:** Shows a summary of reminders set for this document, Finder (Spotlight) comments, and Annotations.
- **Properties:** Shows metadata specific to PDF and rich text files. This includes things like keywords, author, and subject that are sometimes included with these types of files.

Inspectors: This submenu provides access to the inspectors panes.

- **Show/Hide:** Shows or hides the inspector pane.
- **Info:** The *Generic* view shows basic information including name, aliases, URLs, file dates, and kind. The *Custom* view shows metadata specified in *Settings > Data* that has been applied.
- **Annotations & Reminders:** This inspector shows a summary of reminders set for this file, Finder (Spotlight) comments, and annotations.
- **Content:** When viewing PDF files, this inspector provides a *Thumbnails* and a *Table of Contents* pane. Note that the *Table of Contents* panel is only displayed if the current PDF contains one. DEVONthink does not generate the table on its own.
- **Document:** Useful when viewing PDF and RTF files, this inspector displays *Properties*, *Annotations*, and *Links*.
- **See Also & Classify:** This inspector is the main interface to DEVONthink's brain, our built-in AI engine. This engine is analyzing the contents and locations of all documents in your database and

making connections between them. These connections can be seen in this inspector pane.

- **Search:** This pane allows you to search the current document, displaying the found words in context and on what lines they occur. Additionally, you can use the *Replace* field to quickly replace selected or all occurrences of the found words.

- **Concordance:** The Concordance is a specialized view showing data about the words in a document. This can be sorted by frequency, groups, length, or weight. The data can be viewed in a *List*, *Cloud*, or *Graph*. Additionally, selected words are highlighted in the current text and a data graph showing related words will appear in the List and Cloud views.

Filter: The commands in this submenu filter the list of files in the location you are currently viewing. As you select options in these panes, the list of files will change accordingly. The filters are also covered in the windows chapter.

- **Info:** Shows a pane with options for filtering on dates, flagged state, unread status, rating, or color label. When using the calendar, you can click *Any Date* to set which date you want to filter on: added, created, modified, opened, or due.

- **Tags:** Shows a tag cloud, with frequency-based sizing, i.e., more frequently used tags will be larger. Clicking on tags removes unrelated tags from the cloud, only showing tags that have been applied with the current tag.

- **Multimedia:** Displays options for filtering multimedia files - images, audio, and

video - in the current location. Options for minimum and maximum pixel dimensions or durations are available.

- **Maps:** Shows a small map showing pins from geolocation data will be shown. Clicking on a pin will show you files created in that location. The behavior of this pane is similar to Apple Maps, e.g., pinch to zoom in and out, etc.

> Note: When *Info* or *Maps* is selected, the options will appear at the bottom of the sidebar. When *Tags* is selected, they will also appear there, but will also show in the information bar above the item list if the sidebar is hidden.

DOCUMENT COMMANDS

Annotate: This submenu provides access to the PDF and image annotation tools. Applicable to PDF documents you have: *Hightlight Text*, *Underline Text*, and *Strike Through Text*.

Next, the basic annotation types are available: *Oval*, *Rectangle*, *Line*, *Note*, *Text*, and *Link*. Note and link annotations aren't available with images.

These tools are persistent, so you can select one and use it in that mode until you change to another tool.

Capture: This submenu provides options for capturing the current document to a new file in a few different formats: *Bookmark*, *Plain/Rich Text*, *Formatted Note*, *HTML*, *Web Archive*, and *PDF (One Page/Paginated)*. Captures are made to the current group. *Set as Thumbnail* will set a thumbnail for a currently viewed web page, useful to create

a clean thumbnail after dismissing cookie banners. There is also an option to use the *Clip to DEVONthink* command, just like in your browser. This allows you to clip to a chosen location.

> Note: The available options in the *Capture* menu are dependent on the type of the current document.

Mode: Lastly, the commands in this submenu switch between three modes of interaction in PDF documents: *Move*, *Text Selection*, and *Annotation Selection*. When viewing an image, *Move* and *Image Selection* are the available commands.

Rotate & Flip: This submenu provides a *Rotate* command for rotating an image or PDF page right or left, or by 180 degrees. You can also mirror images on their horizontal or vertical axes via the *Flip* commands.

PDF: This submenu provides options for editing the current PDF document: *Insert Blank Page*, *Delete Selected Page*, and *Reverse Page Order*. See the [Documents](#) chapter for more information on PDF documents.

Sheets: This submenu provides access to the following tools for editing a sheet: *New Record*, *Duplicate Records*, *Delete Records*, *New Column*, *Edit Columns*, and *Delete Columns*. See the [Documents](#) chapter for more information on sheets.

IMPRINT, ITEM LINKS, IMPORT MARKDOWN IMAGES

Imprinter: Choose an imprint you have defined in *Settings > Imprinter* to apply it to the current image or PDF.

Item Links: For documents supporting item links and WikiLinks ([See also p. 34ff](#)), there are three commands in this submenu. *Convert WikiLinks to Item Links* replaces detected WikiLinks with their item links. *Update Name of Item Links* will scan the current document for item links and update the link text for any files whose names have been changed. Note: This will not update a name for change WikiLinks, only item links. *Verify Item Links* checks all item links in the document and logs those no longer pointing to a valid target, e.g., because the referenced item is no longer available in any database.

Import Online Markdown Images: Download and link to local copies of images from web content clipped as Markdown documents.

CREATE, SUMMARIZE, MERGE, SPLIT

Create Expense Report: Creates a sheet summarizing custom metadata dates and currencies of selected files. Totals for the amounts will also be included.

Create Metadata Overview: Creates a sheet with records for each selected file. The columns contain data from the generic and custom metadata of each file.

Create Table of Contents: Opens a submenu to create a rich text or Markdown document with links to the currently selected documents.

Summarize Annotations: Creates a document with all annotated text passages of the currently selected documents. In case of items located in multiple databases the summary is created in the global inbox.

From the submenu, choose to create the summary in a rich text document, Markdown document, or a sheet.

Summarize Mentions: Creates a new document containing a list of the documents mentioning the name or alias of the selected document. From the submenu, choose to create the summary in a rich text document or a Markdown document.

Merge Items: Merge the selected documents into one. This creates a new file, preserving the originals. Hold the ⌥ key to choose *Merge & Delete n Documents*, removing the original files after the merged document is created.

When merging documents, the order of the merge will be the order shown in the item list. The topmost selected document will be the first page with the pages beneath it following. The order of the documents can be controlled by the current sort method in the item list. See also p. 156ff

> Note: The resulting file type of a *Merge* operation depends on the types of the selected files. Selecting mixed formats, e.g., a web archive and an image, usually results in an RTFD file being created.

Split PDF: Use commands in this submenu to split a PDF document into separate files. Use *into Chapters* on a PDF containing a table of contents to create separate per-chapter files. Use *into Pages* to 'explode' the PDF into individual single page files.

Split Document: Splits the current document (PDF, plain or rich text) at the insertion mark position in the document.

RULES

These commands allow you to set or run smart rule commands

- **Apply Rules:** Apply the selected rule on selected items that match the rule's criteria, including the location defined in the smart rule.
- **Perform Rules:** Run the selected rule at any time or in any location. This is not isolated to the documents in the current location.
- **Batch Process:** Use this command to quickly define and run commands without specifically defining a rule. This can be useful to modify multiple selected files.

START SERVER, TAKE NOTES

Start/Stop Server: Use this command to start and stop the integrated web server. See also p. 75ff

Take Note: Opens the *Sorter* to the *Take Note* view. If the *Sorter* is not shown, it opens the *Take Note* window.

THE VIEW MENU

The *View* menu contains all the commands for modifying the way DEVONthink displays groups and documents.

SIDEBAR & LAYOUTS

Sidebar: The *Sidebar* view options allow you to switch between the four different sidebar views in a main window. You can toggle the sidebar's visibility by selecting the same option again.

- **Navigate:** This is the main sidebar view, giving you easy access to your databases,

favorites, and global smart groups. See also p. 89ff

- **Reading List:** Similar to Safari's Reading List, this sidebar view allows you to maintain a list of items for later consideration. See also p. 99ff
- **Extras:** This view gives you access to recent updates in tutorials, scripts, and templates. And if you want to keep up on updates from us, it includes links to promotions and release announcements. See also p. 104ff
- **Import:** The *Import* sidebar view gives you access to scanning and email archiving. See also p. 103ff

View: Choose one of the following options to switch between different layouts for the item list in a main window. All these views are similar to options you find in Finder windows.

- **Icons:** Displays items as icons.
- **List:** Displays items in a list view with user-specified columns shown.
- **Columns:** Displays the item list as a set of columns.
- **Cover Flow:** Displays large thumbnails in a side-scrolling view.

Preview: These options allow you to control the position of the current document's preview, or dismiss it altogether.

- **None:** This creates a list only view.
- **Standard:** This shows a preview under the file listing.
- **Widescreen:** This shows the preview to the left of the file listing.

Quick Look/Slideshow: Opens the Quick Look panel for the selected items which can be useful for times when the view/edit pane

isn't displayed. Holding the ⌥ Option key allows you to display the selected files in a Quick Look slideshow.

SHOW TAGS & DETAILS

Show/Hide Tags: Shows or hides the tag bar.

Show/Hide Details: Switches between displaying icons only or displaying icons together with detailed information such as kind, label, size, word count, creation date, and modification date. Available in all windows using icon or column views.

Show Only Documents: When checked, this hides groups and smart groups in *List* and *Icons* views. Note this is a per-database setting, i.e., you can enable or disable it for each open database.

COLUMNS & SORTING

Columns: This submenu lists all columns available to be displayed as column headers in the item list.

Sort: This submenu lists all the attributes that can be used to sort the current item list. Choose *Unsorted* to manually sort the items. DEVONthink remembers sort settings for every group separately and uses those settings when the group is displayed in its own main window

Customize Metadata: Opens a panel showing all the available metadata fields that can be enabled as List view columns or used to sort on. This includes all enabled custom metadata.

FULLSCREEN & ZOOM

Full Screen: Displays either the current document in a full screen mode optimized for reading and editing, or the frontmost window in full screen. There are two options available here:

- **Document:** Shows the current document in full screen. Note this is a distraction-free view, not the standard macOS fullscreen view.
- **Window:** Shows the current window in a standard macOS full screen view.

Zoom: Depending on the document type, you can zoom or out of the document's preview to your needs:

- **Actual Size:** Displays the document at actual size, calculated using the resolution of the screen and the resolution information of the image or PDF.
- **All Pixels:** Displays the document at a 1:1 ratio so that one pixel of the image equals one pixel on the screen (PDFs and images only).
- **Zoom In/Out:** Zooms in or out of the document.
- **Zoom to Fit:** Displays the document so that it exactly fits either the height or the width of the window/preview pane (PDFs and images only).
- **Zoom to Width:** Displays the document so that its width fits the width of the window or view/edit pane (PDFs and images only).

DOCUMENT & PDF OPTIONS

Document Display: This submenu contains commands for displaying alternate views of some documents. Note there are alternate commands shown when used with sheets or HTML and Markdown files.

- **Best Alternative/Preview/Table View:** Shows a QuickLook view, or a rendered view for HTML-based and Markdown files, the Table view for sheets.
- **Text Alternative/Source/Form View:** Shows a text-only view of some file types, e.g.,Word or email. Also shows the page source of HTML-based and Markdown files or the Form view for sheets.
- **Side-by-Side:** Shows a side-by-side view of the rendered view and source for HTML and Markdown files. Note this does not apply to Formatted Notes.

PDF Display: This submenu lets you adjust the way PDF documents are displayed:

- **Single Page, Two Pages:** Shows a multi-page document as single pages or two pages facing each other (as in a magazine).
- **Continuous Scroll:** When checked, shows the pages of the PDF as one long scroll. When unchecked, only one page is shown at a time.
- **Book Mode:** When checked, facing pages start with one single page (the title page), then facing pages. When unchecked, they start facing.
- **Page Breaks:** When checked, pages are shown with a small break between the

pages. When unchecked, the pages appear as a continuous document.

- **Crop Box, Media Box:** Crops the page to the crop or media box. By default, PDF pages are cropped to the crop box.

TOOLBAR

Hide/Show Toolbar: Hides or shows the toolbar of the frontmost window.

Customize Toolbar: Lets you configure the toolbar of the frontmost window.

THE GO MENU

For people who prefer to use the keyboard for navigation, the *Go* menu contains all commands for navigating the hierarchy of your DEVONthink database, all with keyboard shortcuts. Use these commands to go backwards and forwards through your documents, or to move back to the top level of the group hierarchy.

DATABASES

Previous Database: Selects the previous database in the Navigate sidebar.

Next Database: Selects the next database in the Navigate sidebar.

GROUPS

Top Group: Returns you to the top level of the database (also known as the "root").

Enclosing Group: Changes the view to the parent folder of the current group or document.

Selected Group: Changes the view to the currently selected group.

To Group…: After classifying or moving documents to a new location, use this command to quickly jump to the last used destination.

DOCUMENTS

First/Previous/Next/Last Document: Navigates to the first, previous, next, or last document of all documents in the current group. This is useful when you have opened a document in a separate window and want to move to another document in the same group.

To Group: Opens a popover where you can search for a group by name. Results are shown as you type. The chosen group from the results will display as the current group.

To Document: Opens a popover to quickly navigate to a specific document.

To Page/Time: Allows you to jump to a specified page (PDF documents) or time (supported video and audio files).

To Link: Opens any detected links in selected text in plain text, rich text, and Markdown documents.

Back/Forward: Moves backwards and forwards through all documents/web pages you have visited by following cross-links or Wiki-style links.

Previous/Next Instance: Navigates backwards and forwards through all instances of a replicated document. Use these commands to find out where the other instances of a replicated item are.

Previous/Next Highlight: Navigates backwards and forward through all highlighted passages within a document, regardless of whether these passages have been highlighted by a search or manually using *Format > Highlight*.

Next Unread Item: Navigates to the next item with an unread status in the current database.

Complete News:

MOVE FOCUS

Choose a command, or use its shortcut, to quickly switch focus to different panes of a DEVONthink window. The options available are dependent on the visible UI elements, e.g., if the inspectors aren't visible, the *Move Focus to Inspector* command will be disabled.

- **to Sidebar:** The current sidebar, e.g., the Navigate sidebar will have focus. Note this command requires *Settings > General > Interface > Keyboard Navigation* to be enabled.
- **to View:** The item list will have focus.
- **to Preview:** The view/edit pane will have focus.
- **to Inspector:** The current inspector will have focus.

Favorites: Displays a submenu of items in the *Favorites* section of the Navigate sidebar.

WORKSPACES

Workspaces allow you to save the state of your open databases, as well as the contents and positions of all open windows, so that you can restore them later. This is ideal if you are working with the same set of windows

over and over again. Save these windows as a workspace and recall them whenever you need them again.

From the Workspaces submenu you can:

- **Add:** Saves the currently open windows and open databases as a workspace.
- **Edit:** Opens a window that allows you to edit saved workspaces. Click on a workspace name to change it, reorder by dragging, and delete with the - button.
- **Update:** Updates an existing workspace to the current state of databases and windows.
- **Choose:** Choose a workspace from the list of saved workspaces to load it.

THE WINDOW MENU

Just like most every macOS application, the *Window* menu lists all open windows of the active application and gives you access to commands for managing them.

WINDOWS & TABS

Close, Zoom, Minimize: These three commands resemble the red, yellow, and green buttons of any window title bar, and consequently close the window, minimize the window to the *Dock*, or maximize the window. No magic here. Hold the ⌥ Option key to change allow the command to affect all windows.

New, Close, Select Next/Previous Tab: Opens a new tab, closes the active tab, or moves the focus to the next or previous tab.

> Note: Tabbed browsing needs to be enabled for these commands to work.

Bring All to Front: Brings all windows of DEVONthink to the front. Hold the ⌥ Option key to change *Bring All to Front* to *Arrange in Front.*

ACTIVITY, DOWNLOADS, LOG

Activity: Opens the *Activity* panel. This panel shows all running processes, e.g.,OCR or sync activity, and allows you to manually stop them.

Download Manager: This command opens the *Download Manager* panel of DEVONthink. Using the *Download Manager*, you can download files or complete web sites from the internet and store them directly in your database.

Log: Opens the Log panel. The log lists error messages and warnings that occurred while importing new documents. It also opens automatically when an error occurs. You can save the log to a text file or clear it.

OPEN WINDOWS

Window List: Select any open window from the menu to bring it to the front.

THE SCRIPTS MENU

The *Scripts* menu is located left of the *Help* menu and shows a stylized AppleScript ⌗ symbol instead of a normal menu title. It contains a collection of useful, predefined AppleScripts you can use directly from within DEVONthink.
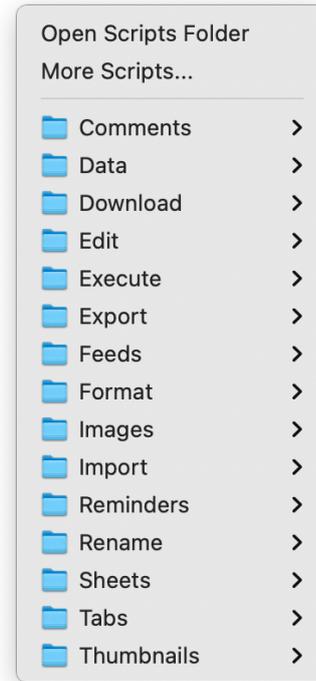
Some of the scripts work without having selected a document, while others require you to select the document you want the script to interact with. In general, the script will tell you what you have to do when you select it from the ⌗ menu.

Use *More Scripts* to install additional scripts and read more about scripts and DEVONthink's ⌗ menu here.

THE HELP MENU

The *Help* menu contains commands for opening the integrated help pages, the support assistant, or visiting the DEVONtechnologies website.

by explaining everyday DEVONthink tasks in step-by-step detail. Note this function requires an Internet connection.

CONTACT

These commands take you directly to the corresponding pages on our website or send feedback directly us.

DEVONtechnologies: Quickly access our home page.

Your Account: Opens the login page for your DEVONtechnologies account where you can get information on your licenses and the devices they're registered to.

User Forum: Jump into our user forum.

Frequently Asked Questions: Choose this option to access many often asked questions in the Questions & Answers section of our website, pre-filtered for questions about DEVONthink.

Contact Us/Report Bug: Use this to draft a general email to us. When you need to report an issue, hold the ⌥ Option key to show the *Report Bug*. This creates a new message in your default email client or Apple Mail containing the console log and all related crash logs in a ZIP archive, ready to be sent to our customer support.

THE DOCK MENU

The *Dock menu* appears when you click *DEVONthink's icon* in the *Dock* with the ⌃ Control key pressed, when you right-click it, or when you left-click it and hold the mouse button for one second or longer. When items are added to a database, a badge appears

DEVONTHINK

Use these commands to open the integrated help pages, get directions on installing the browser extension and bookmarklets, or access the list of changes to DEVONthink.

- **DEVONthink Help:** Opens the internal documentation.
- **Extensions & Bookmarklets:** Opens the section in the help with information about our browser extension and bookmarklets.
- **Release Notes:** Opens the What's New section of the documentation so you can see what's new, improved, fixed, or removed in each release.

SUPPORT

Support Assistant: Opens the support screen of the *Welcome to DEVONthink* assistant with more direct links to the DEVONtechnologies website, tips, and tutorials. Note this function requires an Internet connection.

Tutorials: Opens the *Tips and Tutorials* screen of the *Welcome to DEVONthink* assistant. The tutorials help get you started

on this icon. Longer tasks, e.g., importing, indexing, or running scripts, may show a progress indicator on the dock icon.

It also contains the generic macOS commands and an *Options* menu common to all macOS applications. DEVONthink-specific items are listed below:

File Types.dtBase2
Link Test 02.dtBase2
Temp.sparseimage
✓ Inbox

New Window   ›
Start Server
Take Note...

Options   ›

Show All Windows
Hide
Quit
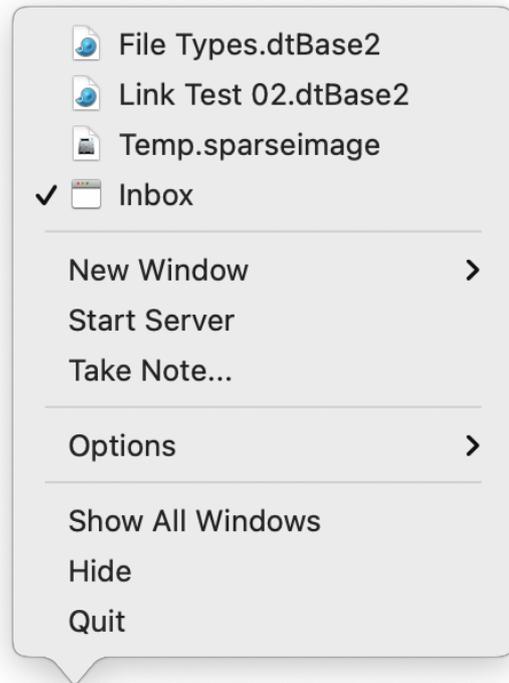
Recent Databases: Quickly reopen a closed database from this list.

Open Windows: Switch to any open window from this list. The active window is displayed with a checkmark next to it.

Take Note: Opens the Take Note panel.

Start/Stop Server: Starts or stops the web server.

SETTINGS

The Settings window, which you open by selecting *Settings* in the [application menu](#), is the place to go to change global settings for DEVONthink. You will find a wide variety of options so you can fine-tune many aspects of the operations and your experience.

There is also a number of hidden preferences, intended for customer support, but maybe useful for you, too.
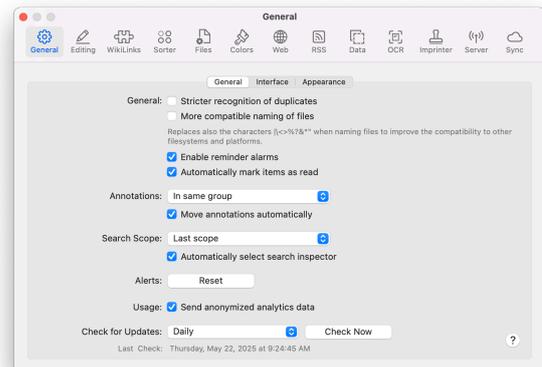
GENERAL

GENERAL

Use the *General* tab to set the general behavior for the application, e.g., whether to check for updates automatically or keep groups on top when sorting.

General: Set the options for duplicate detection or to enable alarms for reminders.

- **Stricter recognition of duplicates:** Check to have DEVONthink use document contents, file type, file size, and the content hash of the document, when detecting duplicate files.
- **More compatible naming of files:** Replaces the characters `|<>%?&*"` when naming files to improve the compatibility with other filesystems and platforms, e.g., Dropbox or OneDrive. Forward slashes and colons are always replaced as these are reserved by macOS.
- **Automatically mark items as read:** Enabled by default, this option marks any

previewed item as read, just as applications like Apple Mail do. Disable this option to manually mark items as read.

- **Enable reminder alarms:** Enables or disables using DEVONthink Reminders. This can be set on a per-machine basis.

Annotations: Controls where to save annotation files and whether they should be moved when the referred file is moved, e.g., when moving the source file to another database.

- **Location:** Choose to save newly created annotation files *In shared group* or *In same group*. The shared group is an *Annotations* group in the root of the current database.
- **Move annotations automatically:** Enable this to cause annotation files to "follow" their referred files. For example, if you move the source file to another database, the annotation file will be moved to the new database as well

Search scope: Controls where new searches begin searching and the behavior of the Search inspector.

- **Scope Location:** Set where toolbar searches should look when a new search is initiated. The options are: *Last scope*, *Current Database*, *All Databases*, and *Current Selection*.
- **Automatically select search inspector:** Enable this to switch to the Search inspector if the view/edit pane and inspectors are already visible when doing a search. This option is enabled by default.

Alerts: Click *Reset* to make DEVONthink show alerts again that you previously dismissed with "Don't show again" checked.

Send anonymized analytics data: Sends anonymous information about certain activities in DEVONthink, e.g, a key denoting an optional script you installed. See our company's Privacy page for more information on the data that may be sent.

Check for Updates: Change the settings in this tab to define when you want DEVONthink to check for new versions: never, on startup, daily, weekly, or monthly. DEVONthink only performs checks for updates when the computer is connected to the Internet.

Click *Check Now* to immediately check for a new version.

INTERFACE
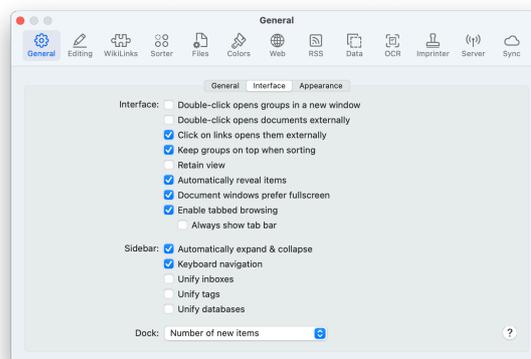
The options control interface behaviors including some of the *Navigate* sidebar.

Interface: These options control the behavior of the interface, e.g., when double-clicking documents.

- **Double-click opens groups in a new window:** This option allows you to open a new window when you double-click a group. If unchecked, the group will be selected

and its contents will be replace the file list being currently viewed.

- **Double-click opens documents externally:** Check this if you'd like documents to open in an external application when double-clicked. DEVONthink uses the application set as the default application for the file type in the operating system, e.g., TextEdit for RTF documents. If unchecked, any document that can be edited in DEVONthink will be opened in its own window.
- **Click on links opens them externally:** Enable opening links in document text in the system default application. Use ⇧-click to open and activate the default application. Note ⌘ or ⌥-clicks can be still used to open links in new tabs or to add them to the Download Manager, respectively.
- **Keep groups on top when sorting:** Always display groups at the top of the item list, independent of the sort method, e.g., by Name, by Date Added, etc.
- **Retain view:** When enabled, the view settings in the current main window, e.g., Icons in Widescreen, override the view settings of other groups or databases. If a change is made to the current view, that change will persist when switching. If no changes are made, the previous view settings will be restored after disabling this option.
- **Document windows prefer fullscreen:** When enabled, while viewing a fullscreen main window, document windows opened from it will be opened in fullscreen as well.
- **Automatically reveal items:** Enable this to reveal the currently displayed item in

the item list, for example when switching between document tabs in a main window.

- **Enable tabbed browsing:** When checked, click with ⌘ Command pressed a link in web, PDF or text views to open it in a new tab. When unchecked or the ⌘ modifier key isn't pressed, documents are opened in the same view, in the default application or in new windows. Check *Always show tab bar* if you'd like to view the document title in a tab bar when only one document is open.

Sidebar: These options toggle the unification of items in the *Navigate* sidebar as well as the ability to navigate it via keyboard.

- **Automatically expand & collapse groups:** Check this to automatically select and expand a group in the sidebar when revealing or opening it.
- **Keyboard Navigation:** Enables keyboard navigation with typing selection, and arrow key hoisting of groups in the *Navigate* sidebar.
- **Unify Databases:** When enabled, navigate the groups of the root of all open databases in the *Open Databases* section of the *Navigate* sidebar. When disabled, the groups of the root of the active database are displayed in an active database section in the sidebar. This allows isolating the groups of a database. The active database will have an asterisk to the left of the name.
- **Unify inboxes:** Display the inboxes of open databases only in the *Globals* section of the *Navigate* sidebar. When disabled, the inbox will be displayed in the item list for the current database.
- **Unify tags:** Display the Tags group of open databases only in the *Globals* section of

the *Navigate* sidebar. When disabled, the Tags group will be displayed in the item list for the current database

- **Dock:** Specify what items to count and display on the badge on DEVONthink's dock icon: *Number of new items*, *Number of unread items*, or *Number of unread news*.

APPEARANCE
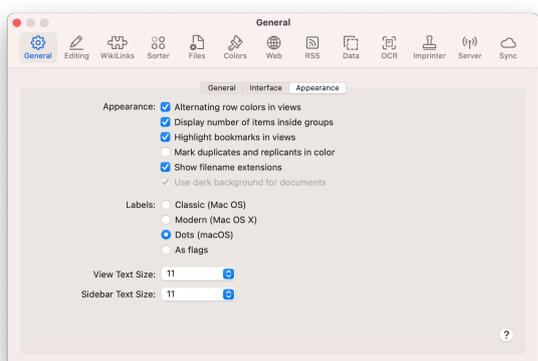
These options control the look of some parts of the interface.

- **Alternating row colors in views:** Check to color every second row in item lists differently.
- **Display number of items inside groups:** Check to show the number of documents in groups. In the sidebar, the total number of items in the group is shown. News feeds will show the number of unread items. In the item list, this shows the number of unread and total documents contained in a group. For example, "2/10" shows there are two unread documents out of ten total documents.
- **Highlight bookmarks in views:** Check to show bookmarks in the item list and links in documents marked in blue and underlined.
- **Mark duplicates and replicants in color:** Check to highlight duplicates marked in

blue and replicants marked in red in most views. When unchecked, duplicates and replicants display a property icon to the right of a document's name.

- **Show filename extensions:** Check this if you prefer to see the file type's extension at the end of filenames.
- **Use dark background for documents:** When enabled, compatible documents, e.g., rich text, will display white text on a black field when using macOS' dark mode. When disabled, documents will display normally.

Labels: Choose how you would like labels to be shown in lists.

- **Classic:** Tints the group/document icon (like on Mac OS 9).
- **Modern:** Puts the group/document name in a colored bubble (like on older versions of OS X).
- **Dots:** Shows a colored dot in the list (like on macOS).
- **As flags:** Displays a colored dot in the *Flag* column of the item list in *List* or *Columns* view or to the left of an item's name in *Icon* view.

View Text Size: set the font size used in the item list, the contents of sheets in table view, and the *Annotations* and *Attachments* tabs of the *Document* inspector.

Sidebar Text Size: Set the font size DEVONthink uses in the sidebars.

EDITING
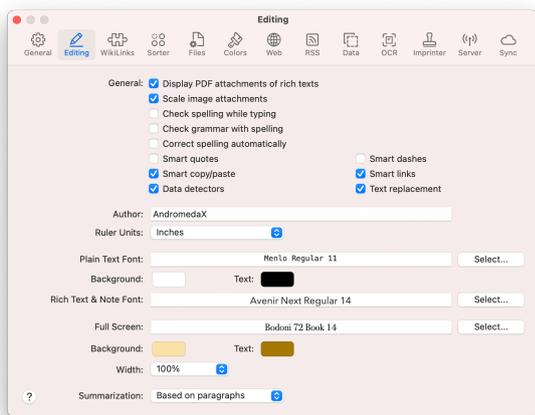
The Editing tab defines all options that fine tune DEVONthink's text editing behavior, from the ruler units to default font settings to summarization options.

GENERAL

- **Display PDF attachments of rich texts:** When checked, a PDF inserted into an RTFD documents will display its first page. Unchecked, you will see a link and the PDF's filename.
- **Scale image attachments:** Images added to rich text files and formatted notes are scaled to the current width of the view/edit pane.
- **Check spelling while typing:** Spellcheck while you write.
- **Check grammar with spelling:** Check grammar as well as spelling while you write.
- **Correct spelling automatically:** Correct misspelled words automatically.
- **Smart quotes:** Convert straight quotes ("inch marks") to typographer's quotes ("curly quotes") while you type.
- **Smart copy/paste:** Insert or remove spaces before and after cut or pasted text.

- **Smart links:** Detect web addresses and turn them into clickable links.
- **Smart dashes:** Convert characters, e.g., two hyphens into a proper dash.
- **Data detectors:** Detect dates, times or addresses in text, and show possible actions when the mouse cursor moves over them.
- **Text replacement:** Use the system-wide text replacements when editing text.

AUTHOR, RULER UNITS AND FONTS

- **Author:** Enter your name. It will be used as default for metadata, e.g., for new rich text documents or PDF annotations.
- **Ruler Units:** Select your personal preference for ruler units: centimeters, inches, points, or picas.
- **Plain Text:** Select your preferred font. This is the font automatically used when you create new documents. Additionally, specify the background and text colors to suit your taste.
- **Rich Text & Note:** Select your preferred fonts for new rich text formats. This is the font automatically used when you create new rich text documents or formatted notes. It is also the default used for rendered Markdown documents, if no default stylesheet is specified.

Note: Hold the ⌥ Option key to restore the default fonts.

FULL SCREEN

- **Full Screen:** Select your preferred font for reading and editing plain text files in full

screen mode. Rich text documents will display their user-specified fonts.

- **Background:** Choose a background color for the full screen mode.
- **Text:** Choose a text color for the full screen mode.
- **Width:** Choose a width for displaying documents in full screen mode. This setting will apply wider or narrower left and right margins, based on a percentage of the screen width.

SUMMARIZATION

Select whether you wish DEVONthink to summarize based on sentences or whole paragraphs.

WIKILINKS
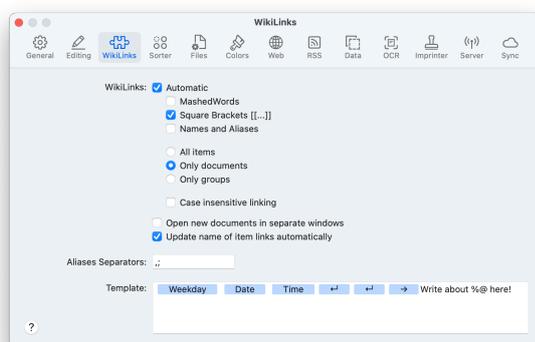
WikiLinks are a way to create interconnected documents in your databases. When enabled, DEVONthink attempts to detect other documents matching the terms you've typed in plain text, rich text, or Markdown documents. This creates an active hyperlink to the detected document, allowing you to quickly jump to it by clicking the link. WikiLinked text displays as underlined text.

For more information on creating WikiLinks and other linking methods, see the Document Linking section.

WIKILINKS

To enable WikiLinking, check the *Automatic* checkbox and choose from the options shown here:

- **MashedWords:** Commonly used to avoid creating links from individual words, mashed words are document titles of joined words. If you type a mashed word, it will automatically create a link. If a matching document is detected, it will open when clicking the link. If a matching document isn't detected, DEVONthink will create a new rich text document, prepopulated with information defined in the Template section below.
- **Square Brackets:** WikiLinked text can be defined using square brackets. Type two opening square brackets and the beginning of a document name. Then press ⌥⎋ Option-Escape to show a list of potential item matches in the database. Choose a document and press ↵ Return to complete the link.
- **Names and Aliases:** Matches documents based on their name or any aliases defined in the Info Inspector.
- **All Items/Only Documents/Only Groups:** Choose whether to match only documents, groups, or both.
- **Case-insensitive Linking:** Enable this to ignore capitalization when matching *Names and Aliases*, e.g., `GlobalEconomy` and `globaleconomy` both would match.
- **Open new documents in separate windows:** When clicking a WikiLink, the

linked document will open in its own document window.

- **Update name of item links automatically:** When the name of item-linked documents is changed, this will update the link text in documents containing item links to those files.

TEMPLATE

Text and items entered here will be used to create a new WikiLinked document. You can type any text you want as well as Control-click and use *Insert Placeholder* to insert a token that will be automatically replaced when the template is created. The default title contains several of these tokens already. Check out the placeholders section of the appendix for information on the available choices.

SORTER
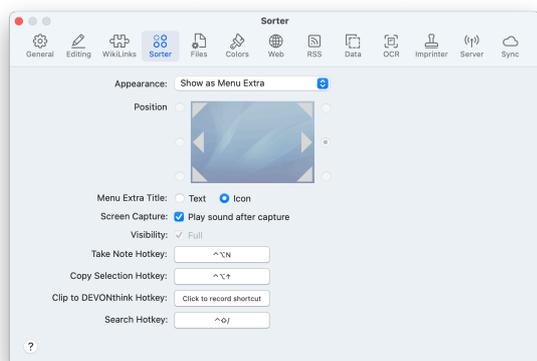
The *Sorter* preference allows you to choose the window's appearance and location, and assign a hotkeys for capturing data or taking a new note. See also p. 58ff

APPEARANCE, LOCATION,…

- **Appearance:** Choose to display the Sorter as a menu extra, a docked tab on the side of your screen, or not at all.
- **Position:** Choose the onscreen position of the docked tab. These options will be disabled if *Show as Dock Tab* isn't selected.
- **Menu Extra Title:** Choose whether to show the menu extra as text, or a space-conserving icon.
- **Screen Capture:** Check this to play the system default screen capture sound.

HOTKEYS

Set system-wide hotkeys for: *Take Note*, *Copy Selection*, *Clip to DEVONthink*, and *Search*.

To change the hotkeys, click the *Click to record shortcut* button, then press the hotkey that you want to use. Press the ⎋ Escape key to cancel recording a new shortcut.

> Note: On macOS Mojave, you will be asked to grant Accessibility permissions for *Copy Selection*, and Automation permissions for *Clip to DEVONthink*.

FILES

The *Files* preferences contains controls for a variety of things from imports to media playblack, thumbnailing to Markdown extensions, and more.
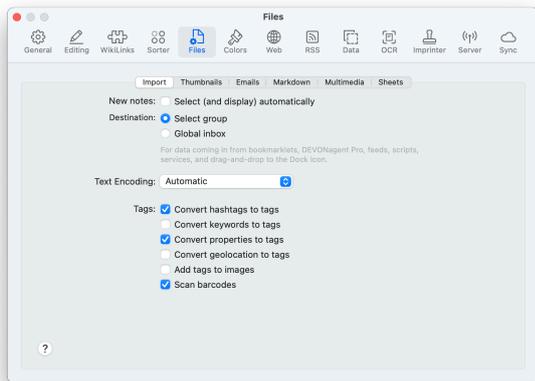
IMPORT

Here you can choose options for the location, encoding, and tagging of files coming from external sources, including bookmarklets, DEVONagent Pro, items dropped on the dock icon, (external) scripts, or services.

New Notes: Check *Select (and display) automatically* to automatically select and display the last note you have taken.

Destination: Choose the default destination where incoming data is stored.

- **Select group:** A group selector is shown that lets you choose the destination. The group selector appears as a black panel floating on top of all other windows. Use it to select the group where you want to file the items.
- **Global inbox:** The data is stored in the global inbox.

Text Encoding: Choose the default encoding used for plain text documents. Select *Automatic* to let DEVONthink choose the best encoding.

Tags: Imported files can have metadata that may be useful as tags. Choose the desired options to convert specific types

of information to DEVONthink tags. These options are honored by email archiving, scanning and OCR, importing from Bookends, Evernote, Apple Notes, and Yojimbo, as well as documents created via the *Sorter* and the web interface (Server edition only).

- **Convert keywords to tags:** Check this to convert embedded keywords from PDFs and RTF(D) files to tags.
- **Convert properties to tags:** Check this to convert embedded properties from PDF and RTF(D) files to tags.
- **Convert geolocation to tags:** Check this to convert proper names of geolocation data to tags, e.g., "Orlando", "FL", and "United States".
- **Convert Hashtags to tags:** Check this to convert found hashtags to tags.
- **Add Vision suggestions to images:** Check this to automatically apply suggested tags to imported images.

Recognition: This section has one option: *Scan Barcodes*. Enable this to detect barcodes in images and PDF documents. If a barcode is detected, the value will be added to the *Barcode* attribute in the *Info > Custom* inspector. Supported barcodes: EAN13, ISBN, and QR codes. And note, the quality of the original will determine the accuracy of barcode detection.

THUMBNAILS
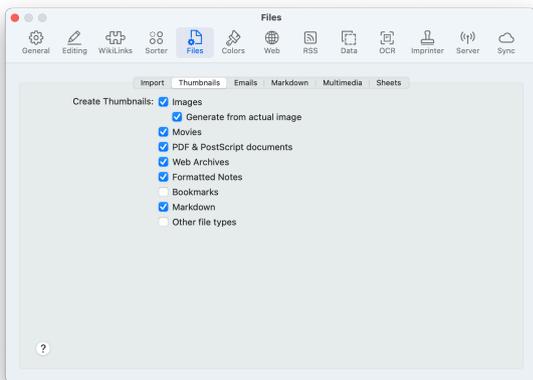
These options control whether DEVONthink displays a custom thumbnail for each file or the default file type icon.

Generate from actual image: For images, an embedded thumbnail will be displayed, if available. Enable this option to create a thumbnail for the image if no thumbnail is already available.

File types: Choose the file types for which DEVONthink should automatically generate thumbnail icons.

EMAILS
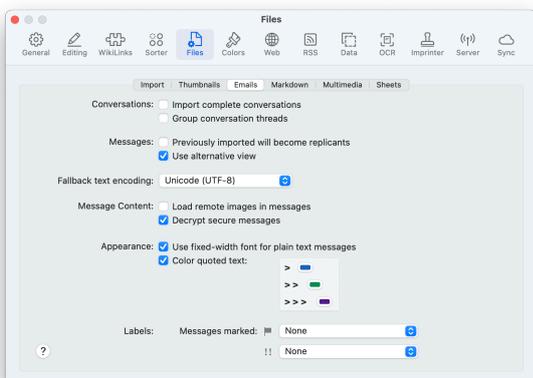
Use these options to define how email is imported and displayed inside DEVONthink.

- **Import complete conversations:** DEVONthink can import not only selected email messages, but also other messages related to a conversation. Check this box to let DEVONthink scan your Sent Messages folder and import sent messages that belong to the same conversation.

- **Group conversation threads:** Check this option to combine all messages belonging to a conversation thread into a group. This makes identifying conversations easier and automatically adds structure to the imported messages.

  Note: These features only work if the email program maintains references to previous messages sent.

- **Previously imported will become replicants:** Check this option to import previously imported messages again as replicants. When this option is unchecked, DEVONthink skips previously imported messages.

- **Use alternative view:** Check this option to view email messages as text alternative by default.

- **Fallback text encoding:** When decoding an email message, DEVONthink uses the message's encoding information. When there is no encoding information, DEVONthink uses the encoding that you set in this pop-up menu.

- **Download remote images in HTML messages:** Spammers and other unfriendly agencies may use images in an email to track if you have read it. Therefore this is unchecked by default. This setting only applies to emails viewed in the Text

Alternative view, not the Best Altenative view, of the View > Document Display.

- **Decrypt secure messages:** Check this to decrypt and file secure email messages. This allows DEVONthink to search or apply AI-based functions such as Classify or See Also to them.

Note: The email message will be stored decrypted in the database package. Its contents are available from within DEVONthink and to other applications or Spotlight.

- **Use fixed-width font for plain text messages:** Check to show plain text messages using a fixed-width font such as Courier. This is useful if the messages contain tables or footers formatted with spaces.
- **Color quoted text:** Check to mark text quoted from previous recipients in messages. Click the color buttons to change the color for first, second, and third level quotes.
- **Labels:** Select which labels you want to assign to messages that were flagged or marked as "high priority". Since items can only have one label at a time, flagged messages are treated as more important than messages marked as "high priority".

Note: The first two options above only modify the display of email messages in the text view. By default, messages are displayed using QuickLook.

MARKDOWN
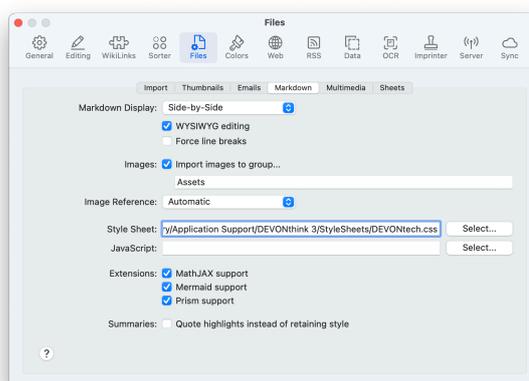
Choose options for the default mode when selecting Markdown files, styling, or any extensions to be used when rendering the Markdown.

Markdown Display: Choose whether you want to open Markdown documents by default in editing, preview mode, or side-by-side mode. *Editing* is the default mode.

WYSIWYG editing: Toggle the display of formatting and detected elements in the source code of a Markdown document.

Force line breaks: Enable this to treat a return as the end of a paragraph without having to add two spaces at the end of the line.

Import images to group: Creates a local repository of linked images. The group will have the name specified in the preference. Images dragged and dropped or copied and pasted from outside DEVONthink will be copied into a group in the current location. Also, images from web content clipped as Markdown documents will be downloaded into the group. (See the Documents > Markdown > Linking Images section for more information.)

Image Reference: Specify the type of link to use with images pasted, dropped, or downloaded to Markdown documents. *Item Link* will always use an item link. *Automatic* will use either item links or relative links, depending on the location of the image in the database. Automatic is the default behavior.

Style Sheet: If you want to choose a default stylesheet to display your Markdown documents, click the *Select* button to access stylesheets stored on your machine, e.g., in `~/Library/Application Support/ DEVONthink3/StyleSheets` or paste the URL of an online stylesheet.

JavaScript: If you want to choose a default JavaScript file to be loaded with all your Markdown documents, click the *Select* button. The JavaScript can be located anywhere, including an online script, if needed.

Extensions: Check the desired options for Markdown extensions:

- **MathJax support:** Supports rendering mathematical equations via the MathJax extension.
- **Mermaid support:** Supports rendering diagrams via the Mermaid extension.
- **Prism support:** Supports syntax coloring of rendered inline code and code blocks via the Prism extension.

Summaries: Enable this if you want Summary documents in Markdown format ( ) to use blockquotes instead of highlight formatting.

MULTIMEDIA
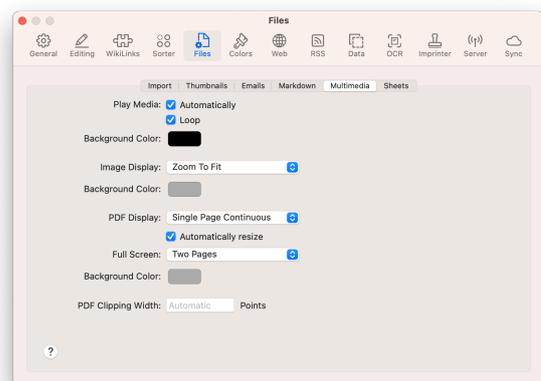
Choose options for media playback or the default display mode of PDFs or images. You can also choose a background color for these media types.

- **Play Media:** Check *Play automatically* to play audio and video files automatically when you display them. Check *Loop* if you want to play the clips in a loop. Set a desired background color for the selected media file.
- **Image Display:** Choose a default zoom factor and a background color for viewing images
- **PDF Display:** Choose the default display size background color for viewing PDFs in windowed and fullscreen modes. Check *Automatically resize* to automatically resize PDFs in the view/edit pane. Set the background color.
- **PDF Clipping Width:** Specify a width in pixels for captured or clipped PDFs. The default value is *Automatic*. Note: The styling on specific sites could override this setting.

SHEETS
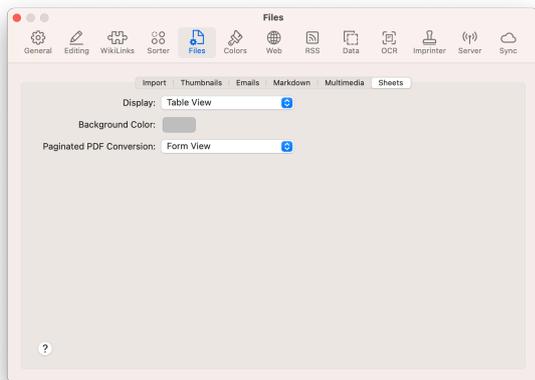
Choose the options for displaying and converting sheets to paginated PDFs.

- **Sheet Display:** Choose the default view when viewing a sheet: *Table* or *Form*. Form view is only available in the Pro or Server editions.
- **Background Color:** Set the background color of a sheet in Form view.
- **Paginated PDF Conversion:** Choose whether to use the *Table View* or *Form View* when converting a sheet to a paginated PDF via the *Data > Convert > to PDF (Paginated)* command.

COLORS
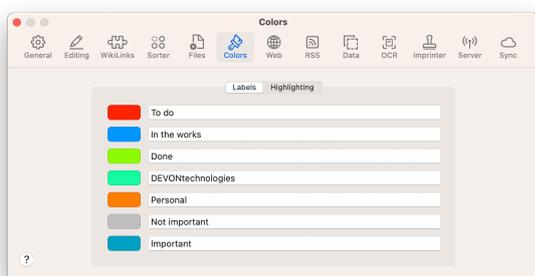
Label: Set the name of color for color labels applied to files and groups in your database.

Highlight: Set the name and color to be used for highlighting text in compatible file formats, like PDFs.

> Note: These are global settings, i.e., you can't have per database label or highlight colors. Also, following Apple's example, we only allow setting seven colors in each category.

WEB
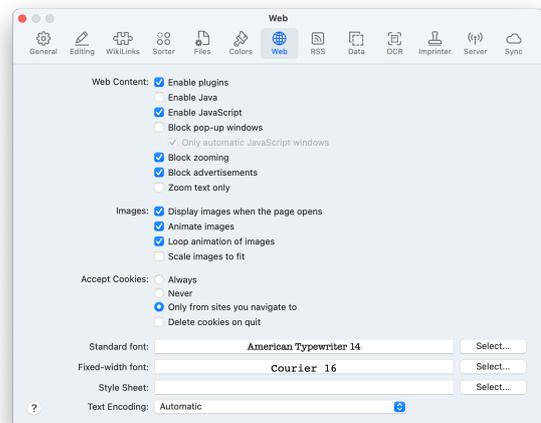
The web preferences resembles the settings of most web browsers. Use these preferences to define how DEVONthink's displays web documents and "live" web pages.

WEB CONTENT

These settings define how DEVONthink treats special web contents:

- **Enable ...:** Check these options to use installed third-party plugins, (such as Flash or RealPlayer plugins), and to run Java applets or JavaScript scripts contained in, or linked to, a web page.
- **Block ...:** Check *Block pop-up windows* to block pop-up windows, which are often advertisements; check *Only automatic*

JavaScript windows to block only pop-up windows opened by JavaScript. Uncheck this option if the web page you're visiting uses pop-up windows for actual content. (Some web content management systems do this.) Check *Block zooming* to keep web sites from automatically zooming windows to full size. Check *Block advertisement* to block common inline advertisements provided by some search engines.

- **Zoom text only:** Check to zoom only the text and uncheck to use Safari-4-style zooming.

IMAGES

These settings define how DEVONthink displays graphics in web pages:

- **Display images when the page opens:** Check this option to display web pages with images. Just remember, if unchecked, you may miss some information.
- **Animate images, Loop animation:** Check these options to run web graphics animations and to run animated graphics in a loop.
- **Scale images to fit:** Check this option to scale (large) images to fit.

ACCEPT COOKIES

Cookies are little text files with information that web pages store on your computer use to recognize you as a returning customer, among other things. While most cookies are harmless, you may want to control what is being stored on your hard disk.

- **Always:** Accept all cookies.
- **Never:** Don't accept any cookies.

- **Only from sites you navigate to:** Accept cookies, but only from web sites you navigate to (not from other sites, such as ad trackers).
- **Delete cookies on quit:** Delete all stored cookies when you quit DEVONthink.

FONTS

Set the fonts you want to use for displaying web pages; set separately for variable-width and fixed-width text.

> Note: Hold the ⌥ Option key to restore the default fonts.

STYLE SHEET

You can further control the way DEVONthink displays web pages by applying a CSS style sheet that changes the rendering on the fly.

Click *Select* and choose your style sheet to apply it to DEVONthink's integrated web browser. Note: This is for experts since it modifies how all web pages are displayed and can lead to undesired effects.

TEXT ENCODING

Select your desired text encoding for displaying web pages. *Automatic* tries to choose the best available encoding. If this does not work for you, choose a more appropriate text encoding for your language group.

RSS
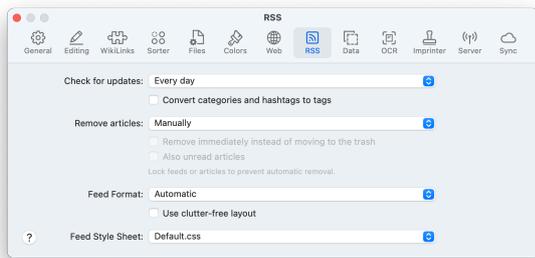
DEVONthink comes with built-in RSS capabilities that enable you to add RSS feeds to your database and have DEVONthink update them automatically. Use these preferences to define how often DEVONthink checks for new articles, whether to skip duplicates when updating feeds, when to remove older articles, and which CSS style sheet to use for displaying the articles.

- **Check for updates:** Set how often you want DEVONthink to refresh your feeds. This can be from 5 minutes to once a day. It can also be when opening or before synchronizing a specific database. And of, there's always the option to check for updates manually.
- **Convert categories and hashtags to tags:** Some RSS articles have tag metadata to help people more easily navigate the publisher's site. Check this option to convert these to DEVONthink tags. Note this can add a great number of tags to your database.
- **Skip identically named articles:** The same article can be delivered when using multiple RSS feeds from one site. Enable this option to avoid downloading duplicate articles.
- **Remove articles:** Set how often older articles are removed from the feed. Check *Also unread articles* to remove them, even if they're unread.

- **Remove immediately instead of moving to the trash:** Immediately deletes the RSS articles.
- **Also unread articles:** Check this to remove all articles at the specified interval whether they've been read or not. You can use *Data > Mark > as Locked* to lock individual feeds or articles and prevent automatic deletion.
- **Feed Format:** Choose a file format for the downloaded articles. (RSS articles are presented as HTML files, by default.) Check *Use clutter-free layout* to try to remove unwanted ads, etc. from the article.
- **Feed Style Sheet:** For HTML (*Feed Format: Automatic*) articles, DEVONthink comes with multiple styles for displaying them. You can use your own RSS stylesheets by placing them into `~/Library/Application Support/DEVONthink 3/StyleSheets`. Enable *Use clutter-free layout* with web archive and single-page PDFs to produce a file with many extraneous elements removed.

DATA
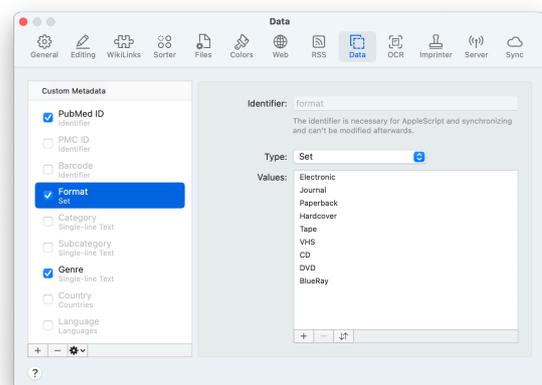
Here you can define [custom metadata fields](#) that can be assigned to your documents.

CUSTOM METADATA

The *Custom Metadata* column contains a range of built-in fields, ready to use or modify, as needed. These cover a variety of common uses and a list of the pre-defined fields can be found in the Data section of the appendix.

Enable any field by checking the checkbox next to it. Use the buttons below the *Custom Metadata* column for extra options:

- **Add:** Click the + to create and name a new custom field.
- **Remove:** Click the - to remove any field. When deleting a field, a warning will be displayed. This warning can be suppressed.
- **Action:** Select any field and click ⚙˅ for more options, including duplicating and renaming the selected field or restoring the default metadata fields.

The order of the fields is also the order in which they appear in the *Info* inspector.

> Note: These options are also available from the context menu.

PROPERTIES

Use these controls to modify the properties of the selected field.

- **Identifier:** This is a special name used in automating with AppleScript. The term is derived from the field's name, and cannot be entered or modified manually.
- **Type:** This is the specific type of the current field. Choose one of twelve data types, such as *Date*, *Boolean*, *Decimal Number*, or *Languages*.
- **Format:** Only displayed with certain data types, you can choose some pre-defined

formats, like *Percent*. With the *Currency* option, you will have an option to enter a currency symbol.

- **Values:** Only displayed with the *Single-line Text* and *Set* types, define a list of items to choose from. These choices will be displayed in a dropdown menu when in use. Add and remove the items with the + and - buttons. Control-click an item to change it. If you'd like to resort the items to alphabetical order click the opposing arrows button.

> Note: Please refer to the Data section for more detailed information on the data types.

OCR
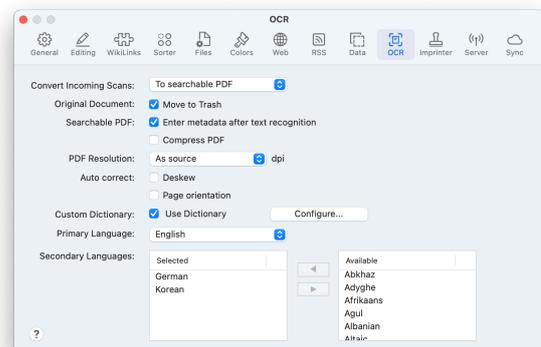
DEVONthink contains an optical character recognition (OCR) module that allows you to import scanned documents and make them searchable. These documents are "read" by the embedded OCR engine and stored as PDF files that contain an additional (invisible) text layer with the recognized, computer-readable text. Use these options to fine tune the OCR process.

You can import scanned documents, or scan them directly from within DEVONthink.

CONVERT INCOMING SCANS

Check *Convert to searchable PDF* to apply OCR to file that have been sent to DEVONthink from a known scanning software, e.g., ScanSnap Home. Choose the desired format of the resulting file: *searchable PDF*, *RTF document*, *Word document*, or *WebArchive*.

ORIGINAL DOCUMENT

Check *Move to Trash* if you want DEVONthink to move the original documents to the trash after they have been successfully imported using OCR. If files are underlined converted by OCR within the database, the original document is deleted from the database. If files are converted at import, the original document is moved to the Finder's trash. Using this option is a great way to prevent your incoming group/folder or database from growing cluttered after OCR is done.

> Note: This option cannot delete files received from the ScanSnap software.

SEARCHABLE PDF

Check *Enter metadata after text recognition* to metadata entry dialog whenever a PDF is imported using OCR. Use this dialog window to enter the preferred document name, the author of the document, and any keywords describing the document. You can also adjust the timestamp of the PDF to the actual date of the paper document. The dialog window is shown when OCR processing has been completed.

When checked, the metadata entry dialog will appear whenever you scan a document or import an image file with OCR. You may want to switch this option off when you are scanning/importing multiple files in a batch.

> Note: Information you enter in this dialog will be available to Spotlight and can be changed in the Preview application. The *title* field will be used to name the document, the *keywords* will go into the Comments field, and the *creation date* will become the creation date of the document in DEVONthink. You can access this information in the Document Properties panel.

Check *Compress PDF* to apply compression to the resulting PDF, creating a smaller file. Compression only applies when adding metadata post-OCR or preserving annotations from an original PDF after OCR.

PDF RESOLUTION

Set the desired resolution for the image layer in the PDF from 150 to 600 dpi. On Apple silicon Macs, you can also choose *As source* to retain the original scanned resolution.

AUTO CORRECT

Check *Deskew* to allow DEVONthink to attempt to straighten the resulting PDF.

Check *Page Orientation* to allow DEVONthink to detect and correct the page orientation.

DICTIONARY AND LANGUAGES

Custom Dictionary: Check *Use Dictionary* to use a custom dictionary of acceptable words. For example, you may have an unusual spelling

of someone's name in some documents. You can enter the name as an acceptable choice for the OCR engine to choose from.

Click the *Configure* button to add custom entries for OCR detection. Note you can only have one dictionary, specified for the language chosen in the *Language* dropdown.

Languages: The Languages section of the OCR preferences lets you identify the languages of the documents you scan in. DEVONthink's OCR engines uses this information to improve the accuracy of the text recognition. DEVONthink comes with more than 150 different language dictionaries.

Select the languages you intend to scan or import with OCR. Set a primary language and add one or more secondary languages using the pop-up menu . Simply select the languages you want to use from the list on the right (*Available*) and move them to the left side (*Selected*) using the right-to-left arrow button. To deactivate a selected secondary language, select it from the list on the left and move it to the right using the arrow button. You can select a maximum of four secondary languages.

> Note: The primary language and the secondary languages are treated equally.

IMPRINTER
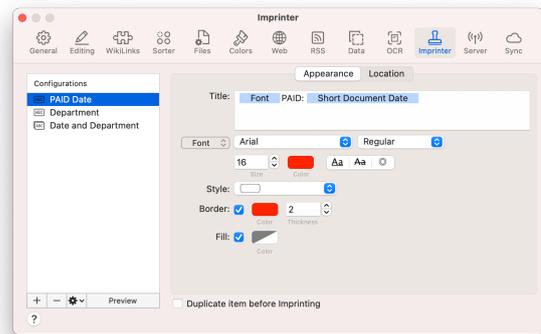
Imprints are custom bits of data that can be stamped onto images or the pages of PDF documents. Imprints can be used in a variety of ways, from stamping when an invoice was paid to adding specialized numbering. With the ability to include placeholders, you can create many kinds of watermarks for your documents.

CONFIGURATIONS

This column lists any custom imprints you've already created. Click an existing configuration to change its appearance or location on future documents, or click and release to change the name. Use the buttons below the *Configurations* column for extra options:

- **Add:** Click the + to create and name a new custom field.
- **Remove:** Click the - button to remove a custom field.
- **Action:** Select any field and click ⚙˅ for more options, including duplicating, renaming, and deleting the selected configuration. A special item in the menu,

New Combined Configuration is discussed below.

- **Preview:** Click this button to see an example of the imprint, as specified by the current settings.

New Combined Configuration: Found in the ⚙⌄ action menu, this option allows you to create new imprints from your existing ones. This extends the usefulness of existing imprints.

From the action menu, select the *New Combined Configuration* option. Two panes will be displayed: *Combined* and a second *Configurations* pane. In the righthand pane, select an existing configuration and click the < button to add it to the *Combined* pane in the center. To remove an item from the *Combined* pane, select it and press the > button. It will reappear in the *Configurations* pane on the right. Combined items will be displayed in the order you add them. To see what the imprint looks like, press the *Preview* button.

> Note: DEVONthink remembers the location and styling of the individual imprints in a combined configuration.

GENERAL OPTIONS

Check *Duplicate item before imprinting* to duplicate the document before imprinting it.

APPEARANCE

Use these controls to define the parts of the watermark, its font attributes, and the style of a containing box, if desired.

- **Title:** This is the body of the imprint. Type any static text you want to appear in the

imprint. *Right-click > Insert Placeholder* to define sections of the watermark with placeholders. Any of these items can be can be reordered easily by dragging and dropping.

- **Font:** In the *Font* options, choose the font, weight, color, and other styling for the watermark. If you choose the outline style, you can choose the *Thickness* of the outline.
- **Border Style:** Choose and style a pre-defined border, if desired. When using a border, you can also specify the border *Color* and *Thickness* and an optional *Fill* color.

> Note: There is only one font style for the watermark. You cannot have mixed styles, e.g., displaying one word larger or in a different color.

LOCATION

In the *Location* tab, choose and fine-tune the position of the watermark, as well as on what pages it will appear.

- **Position:** Choose a general position for the imprint to appear on the document.
- **Offset X/Y:** Fine-tune the position of the watermark. Negative values are to the left (X) and down (Y). Positive values are to the right (X) and up (Y).
- **Rotate:** Set your imprint on an angle, if desired.
- **Occurrence:** Choose what pages the imprint should appear on. Use *Custom* to have the imprint appear on specific pages.

SERVER
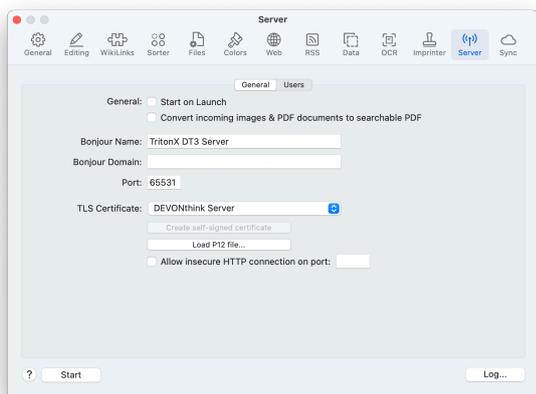
DEVONthink features a built-in web server that allows you to share documents on your local area network, and optionally, over the internet. As soon as the web server starts, other users can use a standard web browser to search your database, view documents, and download them.

> Note: In order to operate properly, DEVONthink needs to be running and will only serve open databases.

Enter all necessary details in the *General* tab and define users and permissions in the *Users* tab. Then click the *Start* button to start the web server available to users whom you have allowed access.

As soon as the server starts, DEVONthink shows the name and two URLs for your database at the bottom of the window. Use either the Bonjour services list of the Bookmarks view in Safari or enter the listed URLs into the address field of your web browser to access your database. Use the numeric address if the Bonjour does not work for your network.

To learn more about using web sharing and how best to make your database available from the "outside" internet, please read on here.

GENERAL

- **Start on Launch:** To automatically start DEVONthink's web server as soon as you launch DEVONthink, check this checkbox.
- **Convert images & PDF documents to searchable PDF:** Check this to automatically convert all images and non-OCRed PDF documents added from web sharing users to searchable PDFs.

BONJOUR SETTINGS

Use these settings to define your DEVONthink server's identity, everything from the name and port, to creating a certificate vouching for the "safety" of the server's activity.

Identity:

- **Bonjour Name:** Enter a distinct name for your computer here that identifies it on the local network using Bonjour. This name will be shown in the list of Bonjour services on other Macs on your network. Switch to the Bookmarks view in Safari or your preferred browser and select *Bonjour* in the sidebar.
- **Bonjour Domain:** Set the Bonjour domain if necessary. Leave this field empty unless you know what you're doing.
- **Port:** If left empty, DEVONthink will assign a random, unused port when the server launches. If the server will be accessed regularly, or from outside your network, setting a static port is suggested. As non-

standard ports can be prohibited on some networks, consult with your IT department.

Security:

- **TLS Certificate:** If you have a TLS Certificate, select it from this dropdown.
- **P12 Certificate:** If you have been issued a P12 file, import it by clicking the *Load P12 file* button.
- **Self-signed Certificate:** If you have neither, it's possible to generate a self-signed certificate for the server. When this option is chosen, users connecting to the server will be prompted the certificate may be insecure. Instruct them to accept your certificate as valid to allow their browser to accept your server's identity.
- **Allow insecure HTTP connection on port:** DEVONthink's server runs on SSL connections for secure browsing. If you have a compelling reason to use the older *http* protocol, check this box and enter the port to be used.

Note: When using the server in administered networks, e.g., public, corporate, or educational scenarios, you may need to consult with the IT department for successful operation.

USERS
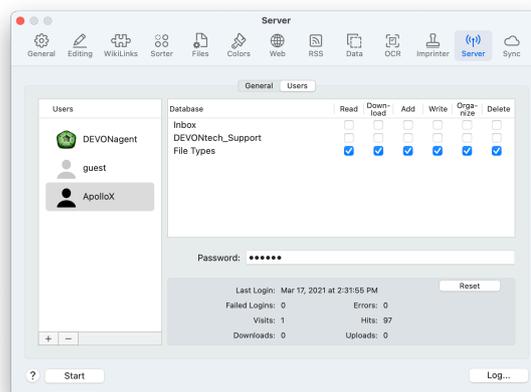
User List: The *Users* tab on the left allows you to add and remove individual users, as well as set per database permissions for them.

- **Add:** Click the + button to add a new user.
- **Remove:** Click the - button to remove a user.
- **Password:** Enter a login password for the selected user in the *Password* field under the *Databases* list.

Note: If you have DEVONagent Pro installed, it will be added as a default user. This allows it to search DEVONthink's databases in the same way it searches other websites.

Database Permissions: The *Databases* list on the right allows you to set per-database permissions for the selected user. All open databases will be listed in this pane, followed by the permissions that can be set. When a user is selected in the *Users* pane, you can set specific permissions for that user. The permissions are as follows:

- **Read:** Allow the user to access the database. When unchecked the database will not be visible to the user.
- **Download:** Allow the user to download documents from the database.
- **Add:** Allow the user to add items to the database.
- **Organize:** Allow the user to move around documents and groups in the database.
- **Delete:** Allow the user to delete items in the database.

> Note: Right-click the database's name to quickly enable or disable all permissions for that database.

Technical Info: If you need more information on the activity of the web server, you can find some deeper details here.

- **Server Details:** The section under the *Databases* pane shows some basic technical data about DEVONthink's server activity.
- **Log:** In cases where deeper technical information about the server's activities is required, click the *Log* button in the lower right corner. The log file will open in macOS' Console application.

SYNC
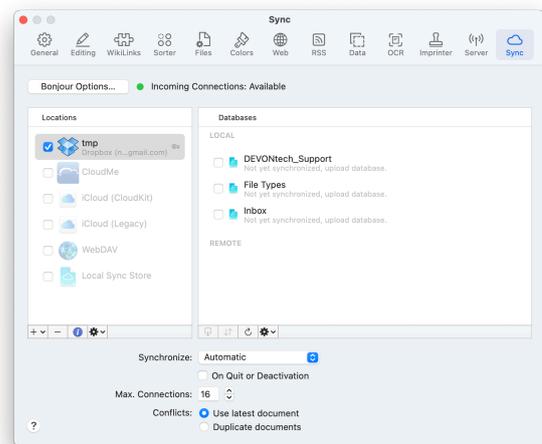
DEVONthink allows you to keep your databases in sync with multiple Macs and iOS devices running DEVONthink To Go. Use these options to control which databases are synced, how often they're synced, with which locations. Learn more about synchronization and how to set it up in a separate part of this documentation.

LOCATIONS

The first column lists all sync locations you have set up. In addition it lists available direct connections and templates for quickly setting up new locations. Active locations are checked. Disabled, inaccessible, or unactivated locations are shown in grey. Locations that have an encryption key specified show a key icon to the right of the name.

Check any location to activate it. If it is not yet set up, DEVONthink will show a sheet requesting all necessary details. Only a subset of the following fields is shown, depending on the nature of the sync location:

- **URL:** The URL of your WebDAV volume including path to the folder where the sync store is located or shall be created.
- **User name:** The user name for the service.
- **Password:** The password for the service.
- **Sync Store Name:** The name of the sync store. If you are setting up an already active sync location, e.g., you've already synced from another device, click the dropdown menu to choose from a list of existing stores.
- **Encryption password:** The password used to encrypt the sync store with AES 256 bit encryption.
- **Synchronize label names & colors:** Check if you want to bidirectionally synchronize label names and colors using this location. Be aware, changes to the colors and names on any syncing machine will sync to the others.
- **Synchronize reading positions:** Check if you want to bidirectionally synchronize reading and playback positions using this location. This can help you keep your place in PDFs you're reading or audio/video you're playing.
- **Synchronize custom metadata definitions:** Check if you want to sync any custom definitions found in the _Settings > Data_ of the higher editions of DEVONthink and actively used on items in your databases. If you are collaboratively syncing, you may want to disable this option to avoid the other party from receiving your specific metadata definitions.
- **Synchronize content of indexed files:** Check if you want to synchronize the content of indexed files using this location. If you uncheck this option only the metadata about the document will be

synchronized. This is generally only used in special circumstances.
- **Verify uploaded items:** Check to verify all uploaded items to make sure that they're intact. Usually only necessary on very unstable network connections or in case you experience troubles with defective files.

Use the tools below the locations list for more options:

- **Add Location:** Click the + icon to add locations not listed by default, e.g., adding another local sync store.
- **Remove Location:** Select a location and click - to remove the location.
- **Show Info:** Select a location and click to show and change the location properties.

Action (Locations): The Locations Action menu also is used for information, troubleshooting, and removing chosen sync locations. In addition to _Show Info_, and _Remove Location_, it contains these special commands:

- **Reveal in Finder:** Opens a Finder window with the chosen sync store selected. This only applies to local sync stores.
- **Verify Location:** Used in troubleshooting situations, this quickly verifies the integrity of the sync data of the chosen sync location. Hold the ⌥ key to select _Verify Location Thoroughly_.
- **Clean Location:** Used in troubleshooting situations, this removes the sync data for all databases synced to the chosen sync location.

All the commands listed above are also available via the context menu.

DATABASES

The second column lists all currently open databases as well as all databases available remotely in the selected location. The *Local* section lists all open database and a message about their sync status, e.g, the timestamp of the last sync. The *Remote* section lists all databases available for import or databases that are currently not open on the machine. When attempting to import the latter, the local database will be opened by DEVONthink.

Check any database that you want to have synchronized using the selected location. If the database is also already available through the location, both versions of the database will be merged and conflicts solved using the chosen conflict solving strategy (see below). Uncheck databases you want to discontinue syncing with the selected location.

Use the tools below the locations list for more options:

- **Import Database:** Select a remote database and click ⬆ to download the data of the database and save it locally. The database will be automatically configured to sync with this location. Alternatively, you can double-click a remote database to import it.
- **Synchronize Database:** Select a checked database and click ⇕ to manually sync the database with this location.
- **Refresh List:** Refreshes the list of remote databases for the selected location.

Action (Databases): The Databases Action menu also contains commands for importing, manually synchronzing, troubleshooting, and removing sync data. In addition to *Import Database*, *Synchronize Database*, and *Refresh List*, it also contains these commands:

- **Import Encrypted Database:** Import a database as an encrypted database. You will need to specify the maximum database size and an encryption key. See also p. 11ff This option can be used when importing any database, but it will not encrypt an unencrypted database on the source.
- **Verify Database:** Used in troubleshooting situations, this quickly verifies the integrity of the sync data of the chosen database. Hold the ⌥ key to select *Verify Database Thoroughly*.
- **Clean Database:** Used in troubleshooting situations, this removes the sync data for the chosen database in the current sync location.

All the commands listed above are also available via the context menu.

OPTIONS

Change the general sync settings, noting they affect all locations and databases.

- **Synchronize:** Choose if you want to synchronize automatically, manually, or in fixed intervals. Check *On Quit or Deactivation* to automatically synchronize when you quit DEVONthink or when you switch to another application.
- **Max. Connections:** Choose the maximum number of connections DEVONthink should open. The faster your internet connection the higher you can usually go. The recommended value is 16.
- **Conflicts:** Choose how to solve the conflict if an item was changed both locally and remotely. *Use latest document* preserves the most recently changed document. *Duplicate documents* keeps both versions of the conflicting item and appends "copy" to the end of one's filename.

> Note: The number of maximum connections used is controlled by the service you're using.

BONJOUR OPTIONS
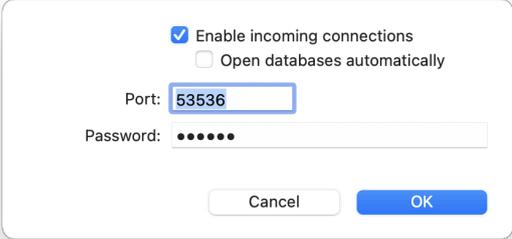
Click the button *Bonjour Options* to control if and how other instances of DEVONthink or DEVONthink To Go can connect to your Mac. Your Mac becomes the sync host or sync server, the other devices the clients.

- **Enable incoming connections:** Check to let other devices connect to your copy of DEVONthink and synchronize.
- **Open databases automatically:** Check to open databases automatically if the connecting side (client) requests it.
- **Port:** If needed you can change the IP port number used for incoming connections. Leave empty to let DEVONthink choose the best port number for you (recommended).
- **Password:** Set the password necessary to connect to your instance of DEVONthink (mandatory). This password is also used for AES-256-bit-encrypting the connection at all times.

TROUBLESHOOTING

DEVONthink was created with robustness in mind. But any computer hardware or software, regardless of how carefully developed and built, can write defective data or destroy files. If you have some general questions about DEVONthink, sales and licensing, etc., plase check out our Questions and Answers section on our site. If you experience specific technical problems with DEVONthink or its databases, please check the following sections.

PROBLEMS IMPORTING FILES

WHY DOES DEVONTHINK NOT RECOGNIZE MY FILES?

If DEVONthink does not recognize a file, make sure the file has a proper file name extension. DEVONthink needs a file name extension to determine the file type. Add the correct file name extension to your files (e.g., `.txt` for

plain text files, `.rtf` for rich text files, `.pdf` for PDFs and `.doc` for Microsoft Word files) and try again.

Also, while DEVONthink supports importing many different file types, there are thousands of types and we can't guarantee trouble-free importing or usefulness with every type.

WHY DOES DEVONTHINK NOT DISPLAY MY DOCUMENT CORRECTLY?

DEVONthink uses Apple's Quick Look technology to display previews of many file formats. If a document is not properly displayed, especially if it is a proprietary file format, it may be you don't have a Quick Look plugin installed for this file type or the application that created the file is not installed on your Mac (and supports Quick Look). Control-click the file and choose *Show In Finder* to reveal it. With the file selected in the Finder, press the spacebar to open a Quick Look window to determine if the item is viewable.

WHY CAN'T I SEARCH MY FILE?

Merely importing a file doesn't mean it's immediately searchable. For example, scan need to be treated with OCR before they can be searched.

For proprietary formats, you need to have a Spotlight importer installed. These components come from third-parties,

typically the developer of the format or an application that can edit it. If there is a Spotlight importer available for the file format you're adding to your database, DEVONthink may be able to use it to gather some information about the document. The kind and amount of information is dependent on how the importer was developed.

WHY ISN'T MY PDF WORKING?

Bad PDFs: PDFs have been around so long, it would seem they'd be easily supported in DEVONthink. However, the truth is there are many bad PDFs out there. If you encounter a bad PDF, try acquiring a new copy of the file.

No Text: You will receive a "No Text" log message with PDFs having no text layer, i.e.,, scans that have not had OCR run on them. In order for their text to be searchable, you must run OCR on them.

Protected PDFs: DEVONthink cannot extract the text part of print- or edit-protected PDFs. When you import these PDFs, you get a log entry that tells you that the file contains "no text". When you select these PDFs in DEVONthink, the status bar shows *Image* instead of *PDF+text*.

One potential solution for this problem is Michele Balistreri's [PDFKey](). It allows you to print protected PDFs. Use PDFKey to "print" a PDF file into a new PDF that is both printable and editable, which allows DEVONthink to extract the text for searching and classifying.

> Note: There are sometimes questions regarding the PDF functionality available in other applications. DEVONthink uses Apple's PDFKit framework, the same as found in their Preview application. If you have an issue with a PDF in DEVONthink, check to see if you have the same issue in Preview. Other applications, including those from Adobe where PDFs were invented, are using their own frameworks.

EMAIL IMPORT DOES NOT WORK AS EXPECTED

Messages aren't imported or can't be filed: Email messages are imported with a special identifier (UUID) that helps DEVONthink keep track of messages that have already been imported. Since a UUID must be unique, you can't have more than one file with that identifier. If you try to import the same message into a database, you will receive a logged message stating "n emails already imported".

Importing takes a long time or stalls: Importing email is not a trivial process. Not only does it copy the message into your database, but it also reads and analyzes the entire contents of each one. If you are importing a large mailbox, the process could cause a timeout.

To increase the timeout to five minutes, please enter this in `/Applications/Utilities/Terminal.app` (each as a separate command) while DEVONthink is not running:

> **Terminal:**
>
> ```
> $ defaults write com.devon-technologies.think3 MailImport.FetchTimeout -float 300
> ```

```
$ defaults write com.devon-
technologies.think3 MailImport.Timeout -
float 300
```

Another possibility is to split the mailbox into multiple smaller ones. Lastly, you don't have to import the entire mailbox at once. Importing smaller batches often proves to be less taxing on the machine's resources.

Why can't I import from email application X?: Inter-application communication, something at which DEVONthink excels, isn't universally developed. In order for more true automation between applications to occur, the developers need to implement robust and reliable mechanisms, like AppleScript. Some apps may provide simple URL schemes but they are limited in use and capabilities, often only able to process one file at a time. Better results can usually be had by merely dragging and dropping. For email clients with a good AppleScript dictionary, the potential for streamlined workflows is increased.

Note: If you are running macOS Mojave or later, you will need to give permissions for the Apple Mail plugin to access your email.
- Quit DEVONthink.
- Quit Apple Mail.
- Enable *Full disk access* in *System Settings > Privacy > Security* for DEVONthink.
- Launch DEVONthink and install (or reinstall) the Mail plugin from the *DEVONthink > Install Add-Ons*.
- Launch Apple Mail and enable the plugin via *Apple Mail > Preferences > General > Manage Plug-ins*.

UNLOCKING A DATABASE

If you open DEVONthink and see an icon of a crossed pencil to the right of the database's name, the database has a file permissions issue. This makes the database readable, but not writeable, so you can't modify the contents in any way.

A permissions issue like this uncommon but generally caused by three events, in order from most to least common: restoring from Apple's Migration Assistant, restoring from Time Machine, or an operating system or hardware error. Doing things like using Migration Assistant will not always cause a permissions issue, but if you have a crossed pencil icon and you've recently migrated to a new machine, this would be the likely cause.

To resolve the issue, do this:

- **Step 1:** Close the database in DEVONthink.
- **Step 2:** Locate your database. If it's the Global Inbox, it's located in `~/Library/ Application Support/DEVONthink`. For other databases, do a Spotlight search for `kind:database dtBase2`.
- **Step 3:** Select the database file and press ⌘I to show the *Info* pane.
- **Step 4:** At the bottom, you'll see *Sharing & Permissions*. Click the *lock icon* to unlock it. You will be prompted to enter your administrative password. (This is the password you use to log into your account on your Mac.)
- **Step 5:** Make sure the account marked *(Me)* is set to *Read & Write*.

- **Step 6:** Click the Action menu and choose *Apply to enclosed items*, if it is available, then close the *Info* pane.
- **Step 7:** Double-click the database file to reopen it in DEVONthink.

If this does not resolve the issue, please [contact our support team.](#)

PROBLEMS USING SERVICES

WHY DO THE SERVICES MENU COMMANDS SHOW NO SHORTCUTS?

They should; however, the keyboard shortcuts for *Services* menu commands are only requested by the supplying application. macOS assigns these shortcuts and has ultimate control over which application or service gets what. If the DEVONthink *Services* menu items do not have shortcuts assigned, it is likely that macOS assigned these shortcuts to another command, or that they are used by the current active application.

WHY DO SPECIFIC SERVICES NOT APPEAR IN THE MENU?

The operating system relies on information supplied by the current application to determine which services should be shown in the *Services* menu. For some applications, often those developed for both Mac and Windows, this information may not be what's anticipated. When this occurs, certain services may not be present. For example, selecting text on a web page in Firefox will display the service *DEVONthink: Take Plain Note*. The same text on the same page in Safari will show that option as well as *DEVONthink: Take Rich Note*.

Another thing to be aware of, there needs to be enough space available to do maintenance, like a [database rebuild](#). To keep an eye on the space, periodically select it in DEVONthink, then choose *File > Database Properties*. At the bottom of the statistics you will see the space consumed and the available space to work with.

SYNC ISSUES

DEVONthink's synchronization was designed to run in self-maintenance mode. If you are having issues syncing your DEVONthink databases, the first place to look is [Windows > Log](#). Most sync related errors and reports will be shown here.

Below we cover some things you can check for the type of sync method you're using as well as some common questions you may have.

THINGS TO TRY FIRST

Here are a few general things to try when you have a sync issue:

- Check your network connections, including trying to log into a remote service.
- Reboot the computer
- For non-Bonjour and non-iCloud sync locations, make sure you're entering the correct store name. When logged into a remote service, the *Sync Store Name* dropdown should list available sync stores to choose from.

- Make sure you're using the correct encryption key value for the sync location.
- Make sure you have sufficient space for sync data, especially when using cloud accounts.

VERIFY & CLEAN

Verifying: If there is an issue reported with syncing, e.g., broken structures or missing manifests, you can verify the sync data to see if it's intact and consistent. Verification is a good first step in these cases. The results of a verification will be reported in the log window.

Cleaning: If the verification fails, you can clean the sync location or database to remove the sync data in that location. The results of the clean will be reported in the *Log* window. After a successful clean, you can upload the database(s) again.

> Note: To ease anyones' mind, cleaning a sync location has no effect on the local databases on your devices. Sync data is not your database and is separate from the local databases on your devices, Mac and mobile.

To verify or clean sync data, open *Settings > Sync* and...

- **Sync Location:** To clean or verify all the sync data from a specific location, Control-click it and choose the appropriate command. For a verification you can hold the ⌥ Option key and choose *Verify Location Thoroughly* to perform a deeper verification of the sync data. For a remote sync location, there may be a pause while a connection is established.
- **Database:** To clean or verify the sync data for a specific database, select the sync location to display the databases list. Control-click the specific database and choose the appropriate command. For a verification you can hold the ⌥ Option key and choose *Verify Database Thoroughly* to perform a deeper verification of the sync data. Repeat this with any databases, as needed.

Both these actions can be used at any time, for preventative purposes or just to get a fresh start with syncing. Also, you may see unwanted databases in the *Remote* section of the databases list for a sync location. Cleaning the location will remove these databases too. But if you want to keep the sync data for your current databases, you can Control-click and clean specific databases in the *Remote* section.

BONJOUR

Bonjour syncs are generally transparent, but it can only be used on a local network that allows Bonjour traffic and non-standard ports. Many public networks disallow this kind of traffic to protect their customers. Also, corporate networks will often disallow this traffic for security reasons.

> Note: Bonjour connections cannot be used over VPN. This is technologically infeasible, at least at the moment.

- Make sure you have entered the same password that you have set in the server Mac's Bonjour options. See also p. 183ff
- Make sure DEVONthink is running on the other Mac or iOS device and both devices are awake.
- Make sure only one device is acting as the Bonjour server for a given database. You should not have two devices with incoming connections enabled trying to serve the same databases.
- Make sure the databases you want to synchronize are open on the other Mac, or enable *Settings > Sync > Bonjour Options: Open databases automatically* on the server Mac.
- Restart the other Mac, the iOS device, or both.
- Make sure this computer is connected to the same network as the other syncing device.
- Make sure any firewalls or applications like Little Snitch are allowing traffic from DEVONthink.
- Check if there are any routers or switches involved. The more switches and routers the less reliable the connection due to port filtering, conflicts, or other unknown factors.
- Restart your router.

If you find yourself on a network that disallows Bonjour syncing, it is possible to connect your iOS device to your Mac via your Lightning cable. This creates a simple ad-hoc network that will allow Mac-to-mobile syncing. If you are in a corporate situation, please discuss this with your IT department to ensure you're not violating any security policies. They may also issue an exception for a specific port you could use for Bonjour syncing. This port would be entered in the *Port* section of the Bonjour options.

ICLOUD

Since your devices are generally signed into your Apple ID, using iCloud for syncing is the easiest to set up. However, it should be understood it can only be used for personal syncing. Collaborative syncing is not possible unless all participants are sharing an Apple ID.

Also, syncing to iCloud is done locally first, the operating system will then upload the changes to Apple's servers and propagate the information about it to all other devices. It generally happens smoothly and in the background but it means you can't expect the changes to be ready on other devices as soon as DEVONthink has finished synchronizing to iCloud.

Here are a few things to check:

- Make sure you have enabled *DEVONthink* in *System Settings > iCloud > iCloud Drive > Options* on each device.
- Make sure all syncing devices are logged into the same Apple ID.

Note: Be aware iCloud can stall. This is a sporadic, but documented, issue that can cause your devices to get out of sync. This is not under our control, nor can we even detect it. Please try a thorough verification of the sync location first. For further help, contact our support staff for assistance.

WEBDAV

Our support for WebDAV services allows you to use cloud services that are WebDAV-enabled. It also presents some self-hosting options, even with some NAS devices. However, they can sometimes be technically more difficult to implement. Here are some things to check:

- Make sure the service or device you're trying to connect to is reachable. This is especially true when self-hosting. If you see errors in the 500 range in the *Log* window, it's a problem with the remote server.
- Make sure you are using the proper protocol in the URL, `http://` or `https://`.
- Make sure the URL is complete. This will be specific to the device or service you're using. For a Synology NAS, for example, you have to add the target volume to the path (a valid URL would look like: `http://diskstation.local:5005/research`). Refer to the service or manufacturer's instructions for the proper URL construction.
- Make sure you have entered your user credentials correctly.

> Note: WebDAV implementations vary so it's not possible to guarantee compatibility in all situations. For self-hosting, Apache implementations are the most compatible.

DROPBOX

Dropbox is our longest supported sync method and is generally reliable and a good performer. However, there are a few things to consider.

According to Dropbox' rules, you cannot sync across user accounts. You also can't share the *Apps* folder between accounts. Also, they only allow our sync engine to be logged into one Dropbox account at a time. If you have a work and a personal account, you can only sync to one with DEVONthink.

- Log into your Dropbox account to make sure it's reachable. If you see errors in the 500 range in the *Log* window, it is a problem with the remote server.
- Make sure you are connected to the correct Dropbox account. The active account will be shown under the sync location's name in the sync preferences.

Collaborative syncing may be possible using a common Dropbox account, i.e., using the same username and password for syncing. But again, you can only sync to one active Dropbox account at a time.

COMMON QUESTIONS

I enabled the sync and nothing's happening: Our sync engine will not sync, upload or download, without being told to. We believe in opt-in processes whenever possible. Merely enabling a sync location just sets up a location to be ready to receive and transmit data. You need to enable individual databases to sync. If you have enabled databases to sync, check *Window > Log* for errors.

I'm seeing a message about an invalid encryption key: When you set up a sync location, you have the option of entering an encryption key. This is used to scramble and descramble the sync data so it's stored in an encrypted state. Once you've synced the first time, this value, even if you aren't specifying

a key, is stored for that sync location. This value must be entered on other devices syncing with this sync location.

You can't add, remove, or modify the encryption key value for a sync location after the first sync. If you want to make a change, you must clean the sync location first. After, the clean, Control-click the sync location again, choose *Show Info*, and make the modification to the key. After the first sync, this will be the value stored for the location. Remember, you must change the value on the other syncing devices. And no, you do not need to do the clean on the other devices before changing the value.

I am seeing a message about missing manifests: Missing manifests are bits of transactional sync data that cannot be located by the sync engine. When this occurs, it can't validate the information about what has been synced. This is not an issue with the databases. See the Verify & Clean section above regarding verifying and cleaning the sync data.

It's telling me I have a duplicate database UUID: As noted in the glossary, a UUID is a unique value given to all DEVONthink databases. If you copy and rename a database file in the Finder, this UUID is preserved and DEVONthink sees two databases with the same UUID. This will not sync correctly. Please contact our support team for assistance on resolving this.

REPAIRING A DEFECTIVE DATABASE

DEVONthink databases are packages containing of your files and the supporting AI-based index. In rare cases this index can get corrupted or out-of-sync. But as your files are stored separately, this is not the end of the world. If your database starts behaving strangely, or if DEVONthink finds inconsistencies during start-up, it is time for some housekeeping.

First we'll deal with the two common terms you'll see in a repair process: missing and orphaned files. Then we'll give you steps to try and restore some order in your databases.

MISSING FILES
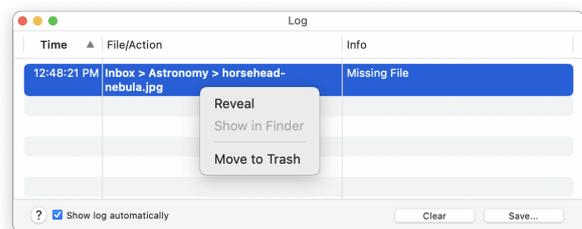
All documents in a DEVONthink database have a path the file system where their content file is located. This path is stored for every document, imported or indexed. If DEVONthink can't find a file at a path stored in its index, it will be reported as missing.

The most common cause of missing files is indexed files being moved in the Finder, or the indexed parent folder being renamed. In the first case, the file isn't in the location it was indexed from. Moving the file back into place will resolve this issue. In the second

case, the path no longer exists as the names in the path have changed. Changing the name back will resolve this.

Regarding indexed items, it's also possible for out-of-date items to be reported as missing, especially in cloud-synced locations. Remember that items indexed in cloud-synced locations may require a manual update via *File > Update Indexed Items* since a filesystem event may not be triggered by the cloud software. Also DEVONthink tries to make sure it doesn't cause any conflicts with those applications.

The second most common cause of missing files is people modifying the internal contents of a database. Some Finder replacement applications, like PathFinder, allow you to access package files like normal folders. The internals can also be accessed by other methods, like the command line or the Finder's context menu. If you delete or reorganize anything, you can easily cause missing files.

Dealing with missing files: Missing files are reported in DEVONthink's *Window > Log*. To deal with these files, Control-click the item in the Log window and choose one of two options:

- **Reveal:** Reveals the item in the expected location in the database. If the *View/Edit* pane is visible, the expected file path is shown beneath a document thumbnail. This path is especially useful when dealing with missing indexed files as it shows the path in the Finder from which the file was indexed. If the path shows the file inside a *Files.noindex* directory, you may use the

following option if the file is of no concern or contact our support team.

- **Move to Trash:** If the missing file is of no value to you, this command moves the file to the database's Trash. Then choose the *DEVONthink > Empty Trash* command to completely remove the file from the database.

ORPHANED FILES

Just as with any database application, controlling the data flow in and out is a critical process. DEVONthink should be the gatekeeper of the files in its databases. If an external agent, whether and application or a user, adds files outside DEVONthink, they will cause an internal inconsistency and lead to orphaned files when following the steps below.

The most common cause of orphaned files is a simple and common one: attempting to create revisions. Say you open a file, a Word document, in an external application. As you are reading it, you decide to make some changes. You type your edits, and select *File > Save As* (or *File > Duplicate* the file first). The application most commonly will open the *Save* dialog in the location of the original file, in this case, inside the internals of the database. You have just created an orphaned file DEVONthink knows nothing about. So the question becomes, how do I create a revision without causing this issue?

- **Duplicate:** Duplicate the item in DEVONthink first.
- **Rename:** Rename the duplicated item. This can be quickly done by immediately

pressing ↵ Return, typing the change, then pressing ↵ again.

- **Open and Edit:** Now you can open the new file and make your edits.

The other common cause is the same as with missing files: getting into the database package and adding files manually.

> Note: Modifying the internal contents of a database outside DEVONthink is unsupported behavior and can lead to broken or inconsistent databases. You should only get into a database's internals when instructed to by our support team.

FILE INTEGRITY

Another report you may see in the Log window is regarding file integrity. DEVONthink scans and stores a SHA1 checksum for each file in a database. This value is updated as the files change. However, if you use the utility command *File > Check File Integrity*, it may report an integrity error. This means the stored checksum doesn't match the newly scanned checksum. This may indicate a problem with the file itself. However, this error will also be reported for indexed items that are not up to date.

STEP 1: VERIFY & REPAIR

As a first step, use >*File > Verify & Repair Database* to check your database's consistency and allow DEVONthink to take all necessary steps to repair any discovered problems. This check will include reporting any missing files, as discussed above, and importing any orphaned files. If *Verify & Repair Database* was able to repair your

database, use *File > Optimize* to optimize your database and have DEVONthink create an internal copy of the index.

> Note: Verify & Repair isn't just for emergencies. Running this command on an occasional basis is not a bad idea. In fact, if you're a fairly heavy user of DEVONthink, running it weekly or bi-weekly does no harm. It's just a routine checkup.

If *Verify & Repair* was not successful or your problems are not resolved, proceed with the next step.

STEP 2: RESTORE FROM BACKUP

DEVONthink keeps up to two copies of the index files in case that the index is damaged beyond repair.

To restore the index file(s) from a previously saved internal backup, hold the ⌥ Option key and select *File > Restore Backup*. DEVONthink presents you with a list of all available backups. Choose the latest one and click *Open.* This swaps the current set of index files with the chosen backup metadata (the current set of index files becomes the backup, the backup becomes the current set) so that data is never overwritten. Run *File > Verify & Repair* to check the consistency of this index version and if everything is in the right order use *File > Optimize* to optimize your database and have DEVONthink create a fresh internal copy of the good index.

If the backed-up index files are also defective, try the other backups, if available. If all backups are broken or corrupted, proceed with the next step.

STEP 3: REBUILD YOUR DATABASE

Since your files and DEVONthink's index are stored independently within the database package, the index can be rebuilt at any time without you losing metadata. However, we generally only suggest this when troubleshooting a database issue.

To rebuild the database from scratch, use *File > Rebuild Database*. During the rebuild process, the index is completely recreated. Your actual files are not touched. Any problems that occur during this process are logged. Also, a new backup metadata set will be created at the beginning of the rebuild.

STEP 4: RECOVER OR MANUAL REBUILD

If everything above failed, your database is severely damaged. You have basically two options:

Time Machine: Restore your database from your Time Machine backup or whichever backup medium you use. If you don't use Time Machine, we strongly advise you to do so. External hard disks are cheap, and Time Machine makes backing up your important files quick and simple.

Manual Rebuild: If you find yourself in the unfortunate situation where you have no backups, it may be possible to rebuild your database manually, following these steps:

- Locate the database (`.dtBase2` file) in the Finder.
- Rename the file by adding, e.g., an `x` to the beginning of the name.
- Control-click the database and choose *Show Package Contents* in the context menu.

- Copy the most recent `backup` folder where your database is located.
- Copy the `Files.noindex` folder into the copied `Backup` folder.
- Rename the copied `Backup` folder to the previously used name and add the file extension `.dtBase2`, okaying the extension when prompted.
- Double-click the new database file to open it in DEVONthink.
- Use *File > Verify & Repair* to ensure that the database is operating properly.

STEP 5: CONTACT SUPPORT

If none of the above steps helped solving the problems you have with your database, please contact us with a precise-as-possible description of your problem.

> Note: In a worst case scenario, if you do not have a current backup of your documents and a manual rebuild didn't work, you can rescue your files manually, but you will lose any group structure. To manually copy your files from the defective database, show the database package in the Finder, Control-click it, and choose *Show package contents* from the context menu. Copy the files in the `Files.noindex` subfolder, which are sorted by kind, to a safe location, e.g., the desktop. If you want, you can create a new database, re-import the files, but you will have to rebuild the database's structures, tags, etc.

DEVONTHINK CRASHES

If DEVONthink crashes while it's running, please hold the ⌥ Option key and choose *Help > Report Bug*.

If DEVONthink crashes on startup, there is no opportunity for you to use our bug reporting mechanism. However, you can manually retrieve the crash logs:

- In the Finder, hold the ⌥ Option key and select *Go > Library*.
- Open the `Logs/DiagnosticReports` folder and locate the most recent crash report for DEVONthink. (The date and time is in the filename.)
- Attach the crash log when you [start a support ticket](#).

In either case, please try to reproduce the crash before reporting it. Also provide enough detail about what you were doing at the time of the crash.

DEVONTHINK BEHAVES IRRATIONALLY

No software on this planet is bug-free, and if an application behaves irrationally there is a good chance that your have just found a bug. But there could also be another cause: The application package could have become damaged during an update or through a bug in a totally unrelated piece of software on your computer.

STRANGE APPLICATION BEHAVIOR

If you see odd behavior like

- menus disappearing or silently refusing to do anything,
- windows showing graphical artifacts,
- or applications not opening at all or opening with strange error messages,

the first step is to reboot the machine.

If that doesn't resolve the issue, try deleting DEVONthink's preferences files. Please quit DEVONthink, launch Terminal app, and enter this:

> **Terminal:**
>
> `$` `defaults delete com.devon-technologies.think3`

> Note: Rebooting a machine can often cure a host of issues, closing down rogue processes, releasing memory, etc. We suggest rebooting your devices at least once a week, just to mitigate potential issues.

STRANGE BEHAVIOR RELATED TO DOCUMENTS

If the strange behavior only happens with a particular document, it is possible the document is damaged, was created in a very old or extremely new file format that is no longer or not yet properly supported, or uses a damaged or malfunctioning Quick Look plugin.

Please [file a support ticket](#) and attach the document in question, packaged as a .zip archive, so that we check to see if the problem lies with DEVONthink or if it the file itself.

SLOW OPEN AND SAVE DIALOGS IN THE FINDER

If you find the Open or Save dialog in applications on your Mac are opening or performing slowly, it may be that you have too many tags in your system. Having 5000 tags or more in your filesystem can cause the Finder to stall as it tries to process them.

As noted in the Finder Tags and Tagging Sources subsections, tags can come from several sources. These tags can also be added to your Finder tags, perhaps unknowingly.

Tags are added to the Finder tags from DEVONthink in one of three ways:

- **Indexed files:** If you're indexing files, any tags you apply in DEVONthink are automatically applied to the files in the Finder. This behavior can be prohibited by enabling the hidden preference *DisableFinderTags*, but bear in mind this will also inhibit importing Finder tags as well.
- **Spotlight Index:** In the Database Properties popover for a given database, there is a *Create Spotlight Index* option. If this is enabled, DEVONthink includes tags as part of the Spotlight metadata, enabling you to use Spotlight searches like *tags:support* in the Finder. However, this also adds to the tags processed by the Finder. If you disable the Spotlight index for a database, the tags for that database will immediately be removed from the Finder tags,
- **Exporting files:** If you export files to the Finder, the tags are added to the Finder tags as they're part of the metadata of the files. The exports include using the File > Export > Files and Folders command,

drag and drop from DEVONthink to the Finder, or doing a File > Rebuild Database. This behavior can again be prohibited by the hidden preference mentioned above regarding indexed files.

Deleting tags in the Finder: While disabling the Spotlight index for a database will immediately remove Finder tags from the system, the other options will not remove tags from the Finder.

In the Finder, press ⌘-, to open the preferences. Select the *Tags* view. Here you will see a complete list of Tags recognized by the Finder. Select the tags you want to remove and press the minus button. You will be prompted to approve the deletion. Note: This does not remove any files. It only removes the tags.

If you have checked the appropriate sections and didn't find your issue or a resolution, please do the following: Hold the ⌥ Option key and choose *Help > Report Bug*. This creates a draft email, ready to send to us, containing troubleshooting information and logs.

> Note: The industry standard turnaround in software development is 48 business hours, i.e., weekends excluded. However, we usually respond earlier. Thanks for your patience and understanding.

AUTOMATION

IN THIS CHAPTER

Automation. No matter how efficient we are, there is always some process that could be done more quickly, and sometimes more accurately. This may be as simple as renaming a file, or as complex as filing, emailing, and archiving. While not everything can be automated, and careful thought should go into your automation plans, DEVONthink offers a level of automation capabilities rarely rivaled in other Mac applications.

AppleScript: Most of DEVONthink is built on a solid foundation of AppleScript. Not only used in the scripts you can install from *DEVONthink > Install Add-Ons*, they are also at the core of several pre-installed templates. Additionally, in conjunction with other AppleScript-enabled applications, the potential for automation on your Mac is

extraordinary. This mature but easy to learn technology is the one we will focus on. See also p. 201ff

Smart Rules: DEVONthink also offers a technology for those with little to no programming experience: smart rules. Smart rules are conceptually similar to smart groups but allow you to choose pre-defined actions to take on matched items. This makes them accessible to all users, while still providing AppleScript execution in the smart rules. They also allow automation based on events. See also p. 210ff

Item Links: While not an automation technology in itself, item links are item-specific identifiers in DEVONthink that can be used in automation. Providing a way to refer to files by a unique and unchanging value, they can help avoid automation problems when items are moved or renamed in your databases. See also p. 218ff

JavaScript: In addition to AppleScript, JavaScript for Automation (JXA) is supported. However, it is bridged by the operating system from AppleScript, not specifically coded for. We advocate AppleScript for its ease of use by new and less-experienced programmers.

On a side note, our AppleScript dictionary has a *do JavaScript* command you can use to interact with web content viewed in a DEVONthink window. With a bit of creativity, some pretty amazing things can be done!

AppleScript Objective-C: This is supported, for those who are inclined that direction.

Terminal: For those who are into other technologies, like Python, bash, Ruby, etc., the question arises: Is there a command line interface (CLI) for DEVONthink? The answer is no. However, you can still use a *do shell script* command in AppleScript when needed. Actually, the combination of the shell and AppleScript creates even more opportunities, as their individual strengths compensate for the other's weaknesses.

APPLESCRIPT

AppleScript is an automation technology introduced by Apple in 1993. Over the years it has matured and become the friend of many Mac users wanting to exert more control over their computing experience. Written in an easy to learn, almost conversational language, it offers a tremendous amount of power with less effort than many languages. DEVONthink has very robust AppleScript support and comes with many built-in scripts. These, and those you write or obtain, make it possible to automate nearly every aspect of the application, and to integrate the application with almost every other macOS application that supports AppleScript.

INSTALLATION

Add-On Scripts: All add-on scripts that come with DEVONthink are automatically installed or updated when you open a new version of DEVONthink for the first time. You can, however, manually (re-)install them

by choosing *DEVONthink > Install Add-Ons*. The scripts from this panel are installed in a number of locations:

- **Script Menu Extra Scripts:** These scripts are accessed from the global *Script* menu when you are in specific applications, e.g., Safari. They are installed in an application-specific subfolder of `~/Library/Scripts/Applications`. See also p. 214ff
- **Folder Action Scripts:** These scripts are used to created hot folders in the Finder. They are installed in `~/Library/Scripts/Folder Action Scripts`. See also p. 216ff
- **Apple Mail Rule Scripts:** These scripts for use with Apple Mail Rules. They are installed in `~/Library/Application Scripts/com.apple.mail`. See also p. 213ff

DEVONthink Scripts: The internal scripts found in DEVONthink's *Scripts* menu are installed in `~/Library/Application Scripts/com.devon-technologies.think3`. The scripts will be found in one of four directories:

- **Menu:** These are the scripts found in DEVONthink's *Script* menu. See also p. 205ff
- **Toolbar:** These scripts are available to add as toolbar buttons. See also p. 207ff
- **Reminders:** These scripts will be executed when a reminder is triggered with an alarm of *Execute External Script*. See also p. 206ff
- **Smart Rules:** These scripts are used as *External Scripts* in the actions of smart rules. See also p. 210ff

Additional scripts, like those you write yourself, can be put into any of these folders to be used in these contexts. Other scripts that may include integration with DEVONthink can be located wherever it's convenient.

SCRIPT SHORTCUTS

Many people like mousing around their applications, while others like to use their keyboards. If you want to add keyboard shortcuts to scripts in this menu, you have two options:

- **System Preferences:** Open *System Settings > Keyboard > Shortcuts > App Shortcuts*. Add a shortcut for DEVONthink, enter the *exact* name of the menu item, and assign a hotkey.
- **Append Filename:** Locate the script in the Finder and append three underscores followed by abbreviated command keys and characters. For example, `eMail Current URL___Cmd-Alt-F2.scpt`. The command key abbreviations are as follows: `Cmd` stands for the ⌘ Command, `Alt` or `Opt` for the ⌥ Option, `Ctrl` for the ⌃ Control, and `Shift` for the ⇧ Shift keys.

> Note: When using macOS Mojave, you will often be prompted by the operating system to allow applications to "control" on another. These permissions are stored in *System Settings > Security & Privacy > Security > Automation*. Please make sure to allow any requests of these kind regarding DEVONthink's control of other applications or your automation attempts will fail for obvious reasons.

LEARNING APPLESCRIPT

While this documentation is not an AppleScript language guide, all the scripts that come with DEVONthink are editable and can be explored or modified as you see fit. The separate sections in this chapter provide any required terminology and a simple example script or two. Additionally, there are some great resources available online and in print. For the official archived documentation, refer to Apple's AppleScript web site. Some additional resources are listed below:

Online:

- DEVONtechnologies Community
- MacScripter
- AppleScript, the Language of Automation
- TECsoft Hands-On Trainings

Books:

- AppleScript: The Missing Manual
- AppleScript: The Definitive Guide

BASIC APPLESCRIPT TERMINOLOGY

AppleScript is not a difficult language to learn. Its plain English approach of "talking" to applications and elements is easily understandable. However, like any language, there are some variations in the words you can use; dialects, if you will. AppleScript is implemented by the developer of an application, so the commands and parameters may be conceptually the same as another application's, but using a different term. This is certainly not meant to be a complete guide to AppleScripting

DEVONthink, but what follows are some common terms or concepts you're likely to encounter. The examples here and in this chapter are meant to give you basic ideas about scripting DEVONthink.

TALKING TO DEVONTHINK

In AppleScript you "talk" to programs like DEVONthink using a `tell` statement, typically referring to an application either by its name, `"DEVONthink 3"`, or its bundle identifier, `"com.devon-technologies.think3"`. While these forms will work, they might become incompatible with a future version, e.g., DEVONthink 4, so we strongly recommend to talk to DEVONthink using the application ID `DNtp`, like in the following statement:

Example:
```
tell application id "DNtp"
close current database
end tell
```

DEVONTHINK'S DICTIONARY

AppleScript-capable applications have their commands, elements, and properties listed in an AppleScript dictionary. DEVONthink includes a large dictionary as a great reference for you. To view the dictionary, open the Script Editor application, select *File > Open Dictionary* and choose DEVONthink in the appearing window. You can also add DEVONthink to your Script Editor library. Select *Window > Library*, click the + button and choose DEVONthink. This way you keep DEVONthink's dictionary at hand.

Note: The use of *the* is almost always optional, but including it can make the script seem a bit less robotic. For example, both lines in this script are functionally the same:

Example:
```
tell application id "DNtp"
set state of children of current group to
true
set the state of the children of the
current group to true
end tell
```

As noted above, the dictionary is the best place to find specific terminology to be used with DEVONthink. However, here are two things to understand:

Records: Every item in a DEVONthink database is a record, a record with properties. Do a search for "record" in the dictionary and you'll see it's a fundamental unit with a wide range of properties associated with it. This means you won't be writing code like, `get the second rich text file`…. You will be dealing with records with a particular type, in this case `rtf`.

There are many commands specifically for use with records: `create record with`, `exists record with`…, etc. Also note there are some commands that require the term `record`. For example: `move`, `delete`, and `convert`. You will see a dictionary listing `move record`, so you can see the command isn't merely `move`, it's `move record`.

Parents and Children: Another concept to understand is parents & children. Generally speaking, these classes deal with the container or the contents of some object. The parent of an object is the group containing it. The children of a group are

the immediate contents of that group, i.e., it does not list the children of sub-groups. Children can be documents or groups; parents will only be groups.

Example:
```
tell application id "DNtp"
set thisGroup to current group
name of (the children of thisGroup whose
(type is XML))
end tell
```

USING LOCATIONS

One of the common tasks people want to perform with AppleScript is importing files to a specific group. In order to direct the files to a given location, you need to reference it properly. Below are three general options for choosing a location:

- **incoming group:** This targets the Global Inbox, or the inbox of a database when using `incoming group of current database`.
- **current group:** This targets the currently selected group in the current database.
- **display group selector:** This shows the group selector so you can choose a location on demand.

There are many times you want to direct files into a specific group. That group may not be the current group you're in and you may not want to choose a destination each time. Here are two common ways of specifying a particular group in your database to be a destination group in your script:

- **get record at...:** This command allows you to set a variable by specifying a group's location in your group structure. The location is a text string, always beginning

with a forward slash denoting the root of the database.

- **get record with UUID...:** When using an *item link*, you can use the alpha-numeric string from the reference URL to point to a specific item. (This command works with both groups and documents.) This form is very useful since it doesn't change when an item's name or location changes.

Example:
```
tell application id "DNtp"
set myGroup to get record at "/Inbox/New
Files"
import "~/Desktop/001.txt" to myGroup
set groupTwo to get record with uuid
"98BBF96D-7743-46C6-9EB4-51C6EF68373C"
import "~/Desktop/002.txt" to groupTwo
end tell
```

WORKING WITH A SELECTION

Many times you want to process items you have selected in DEVONthink. Perhaps you want to generate a list of names and dates for use in a document you're working on. Below is a handler commonly seen in DEVONthink scripts:

- **repeat with thisRecord in (selection as list) ... end repeat:** This is a very common handler, used when processing a selection, single or multiple items.

Example:
```
tell application id "DNtp"
if selection is not {} then
set nameList to {}
repeat with thisRecord in (selected
records)
copy ((name of thisRecord) & ": " &
(creation date of thisRecord as string) &
return) to end of nameList
end repeat
```

```
create record with {name:"Files",
type:text, content: (nameList as string)}
in incoming group
end if
end tell
```

INTERNAL SCRIPTS

The *Scripts* menu of DEVONthink, located to the left of the *Help* menu, gives you access to a large number of pre-made scripts, with more scripts available. These scripts are not only useful for every day use, but are also great for learning how to script DEVONthink.

All the scripts we provide are editable using the Apple's Script Editor, though we do suggest making copies to work on. They are located in `~/Library/ Application Scripts/com.devon- technologies.think3/Menu`. Open this folder in the Finder with *Scripts > Open Scripts Folder* command. Add your own scripts to the menu by adding them to the appropriate subfolder in this directory, even creating subfolders of your own.

A complete listing of the installed scripts can be found here: See also p. 254ff

SCRIPT LOCALIZATION

If you need to support multiple languages in your scripts, it is possible to vary the content of messages based on the language in which DEVONthink is running. You can add your own definitions in a `Localizable.strings` file in the `Contents > Resources` directory of a script package (`.scptd`). This file must be contained in a subdirectory of the `Resources` folder, named with the country code and `.lproj` extension, e.g., `fr.lproj` would

contain French strings. Define a word or phrase in your language, followed by the translated phrase. For example, in a strings file in a `de` subdirectory, enter: `"This is a new day!"="Heute ist ein neuer Tag!";`. In your script, you'd enter a command like, `display alert (localized string "This is a new day!")`. If DEVONthink is running in German, you'd see the German message.

Localization is also available for smart templates. See the Template Localization section later in this chapter.

TRIGGERED SCRIPTS

Triggered scripts are AppleScripts that you attach to an item in DEVONthink (a group or document) and that are executed each time you select the item. Items with attached triggered scripts show an AppleScript icon behind their name.

Using triggered scripts, you can add your own custom behaviors when interacting with items in your database.

ATTACHING A TRIGGERED SCRIPT

While it's possible to write a script that specifies a triggered script for an item in DEVONthink, the usual method is manually attaching one.

- Select the item you want to attach a script to.
- Select *Tools > Get Info* or *Tools > Inspectors > Generic*.
- Click the down arrow next to *Script* and choose *Select*. Note the script can be located anywhere, but it must remain in that location for the script

to trigger. For convenience, you can create a folder for them in `~/Library/Application Scripts/com.devon-technologies.think3/Menus`.

REMOVING A TRIGGERED SCRIPT

Since a triggered script runs when you interact with the item, it can sometimes be difficult to detach the script, e.g., if a script switches to another application when triggered. For instances like this, to remove a triggered script from an item do the following:

- Control-click the item you want to remove the triggered script from and choose *Get Info*.
- Click the down arrow next to *Script* and choose *Remove*.

TERMINOLOGY

Triggered scripts are defined by a specific handler: `on triggered(var)`, where `var` is the variable representing the item the script is attached to.

> **Example:**
> ```
> on triggered(theRecord)
> tell application id "DNtp"
> display alert "" & (name of theRecord as
> string)
> end tell
> end triggered
> ```

REMINDER SCRIPTS

Reminders have several pre-built alarms available for notifications. However, you can only specify one alarm per reminder. Reminder scripts are AppleScripts run by an

alarm set on a specific reminder for an item. By using or writing your own, you can extend notification possibilities of your reminders.

ADDING AN EXTERNAL SCRIPT

To add an external script as an alarm for a reminder, choose *Execute External Script*. The next dropdown lists any available AppleScripts in the `~/Library/Application Scripts/com.devon-technologies.think3/Reminders` directory. Add any of your own scripts to this directory to make them available for any alarm you set.

Currently, there is only one example script pre-installed:

- **Open Document:** Opens the document in a new window when the alarm triggers.

ADDING AN EMBEDDED SCRIPT

Sometimes you only need to add a script for a specific purpose, not general use with all reminders. DEVONthink allows you to quickly write an ad-hoc AppleScript specifically for the current reminder.

To write an embedded script for a reminder, choose *Execute Embedded Script* as the alarm. Click the ... button and a popup will appear with a pre-built handler in place. Add your code as necessary, then press the compile button, the one with the stylized eye, to make sure it compiles correctly. If it does, you will see the code format itself subtly. If not, you will hear a system alert. Click outside the popup to dismiss it. When the alarm goes off, the script will be executed.

TERMINOLOGY

Triggered scripts are defined by a specific handler: `on performReminder(var),` where var is the variable representing the item the alarm is set for.

Example:
```
on performReminder(theRecord)
tell application id "DNtp"
set label of theRecord to 1
say (name of theRecord as string)
end tell
end performReminder
```

TOOLBAR SCRIPTS

Scripts can also be added to the toolbar of any DEVONthink window. While there is a limited amount of space available in a window's toolbar, this is a handy way to launch commonly used scripts with one click.

To add a toolbar script place the script into the folder `~/Library/ Application Scripts/com.devon-technologies.think3/Toolbar`. In order for the script to be available for use in the toolbar, you must quit and relaunch DEVONthink. Then Control-click the toolbar of a DEVONthink window and choose *Customize Toolbar*. Drag your script into the toolbar and it's ready for use.

TERMINOLOGY

Unlike some other script types, there are no special handlers required for a toolbar script. You only need valid AppleScript talking to DEVONthink.

Example:
```
tell application id "DNtp"
open tab for record (content record)
end tell
```

SMART TEMPLATES

Some of the DEVONthink provided <u>templates</u> are "template packages" (`.dtTemplate`) and "smart templates" (`.templatescriptd`). Both templates provide a great deal of flexibility and power, like allowing for inclusion of language resources. With some creativity and scripting know-how, you can set up everything from commonly used group hierarchies to daily journal entries and much more.

TEMPLATE PACKAGES

The simpler type of automated templates DEVONthink supports are: template packages. These are folders with the file name extension `.dtTemplate` that contain one or multiple `.lproj` folders, one for each supported language. Depending on the system language, you can let DEVONthink import the files in the correct language. If you inspect the contents of a template package, e.g., *Classifications > Decimal Filing System.dtTemplate*, you will see the project folders and their assets as a great example of this type of template.

SMART TEMPLATES

The more advanced type of automated templates are smart templates. These are not simple files, but actually AppleScript packages containing script code, and often including related assets that can be inserted into your database. This allows for some very powerful actions like:

- The script can add information to the built-in template, e.g., the current date and time or data from the web.
- The script can act intelligently on data on the clipboard: If it's a simple text, it adds the text; if it's a URL, it adds it to a different area of the document and makes it clickable.
- The script can check if a certain application is installed, e.g., OpenOffice, before adding a document.

CREATING TEMPLATES

Template Packages: To create your own template package, you can duplicate an existing template, Control-click it, choose *Show Package Contents* and edit the internals as needed. Also note exporting multiple selected files will yield a template package.

Smart Templates: To make your own smart templates, have a look at the prefabricated smart templates. Duplicate a `.templatescriptd` file, like the "Note" template. Control-click it, and choose *Show Package Contents*. You can inspect and modify the supporting assets and the `main.scpt` file to fit your needs.

TEMPLATE PLACEHOLDERS

Placeholders in templates are simple control codes that are replaced by DEVONthink when a template file is imported. These placeholders can be used in your files, including simple templates, or folder names of your templates packages. When used in files, they are typed in the text of DEVONthink-native files; e.g., plain or rich text, Markdown, etc. These can be manually typed or you can Control-click in the text and choose *Insert Placeholder*. Below is a list of valid placeholders:

- **%time%:** The current time
- **%date%:** The current date
- **%shortDate%:** The current date in short format
- **%longDate%:** The current date in long format
- **%monthname%:** The month name of the current date
- **%weekday%:** The week day name of the current date
- **%day%:** The day number of the current date
- **%month%:** The month number of the current date
- **%year%:** The year number of the current date

- **%author%:** The author entered in *Settings > Editing > Author*
- **%username%:** The user's name
- **%fullUsername%:** The user's full name
- **%organization%:** The user's organization from Contacts
- **%emailAddress%:** The user's email addresses from Contacts

- **%host%:** The host name
- **%databaseName%:** The database name
- **%databasePath%:** The database's path
- **%groupName%:** The name of the parent group
- **%topGroupName%:** The name of the top group
- **%clipboard%:** The clipboard contents as plain text
- **%styledClipboard%:** The clipboard contents as rich text
- **%clipboardLink%:** The clipboard contents as a clickable rich text link if the clipboard contains a valid URL

> Note: There are more placeholders from the context menu than can be used in a template. For example, the placeholder `%record_locality%` relates to an existing record, so this placeholder will not be used when creating a file from a template.

Custom Placeholders: One more powerful feature of smart templates is the ability to define custom placeholders, extending the possibilities beyond the list shown here. This allows you to add a custom placeholder in the text of a template, then define the replacement value for that placeholder in the `main.scpt`. As a great example, check out the use of the custom `%project%` placeholder in the Project smart template. Notice the use of the placeholder in the enclosed rich text file and the script.

TERMINOLOGY

With the internal script of a smart template, there are no special handlers required. However, the internal script must be located in the `Contents/Resources/Scripts` folder

inside the package, and it must remain named `main.scpt`. Beyond that, you only need valid AppleScript.

TEMPLATE LOCALIZATION

If you need to support multiple languages in your templates, it is possible to have the name and/or content change based on the language in which DEVONthink is running. You can add your own definitions in `.strings` files in the `Contents > Resources` directory of a template package. Here are the files that can be used:

- **LocalizedNames.strings:** Contains definitions of the localized name of the item created by the template. The syntax defines one name per line: `"en"="My Project";` or `"de"="Mein Projekt";`.
- **Localizable.strings:** This file must be contained in a subdirectory of the Resources folder, named with the country code and `.lproj` extension, e.g., `fr.lproj` would contain French strings. Contains localized definitions of words or phrases, e.g., the content in a document created by the template. The syntax defines one word or phrase per line: `"Daily Journal"="Tageszeitung";`.

TOOLBAR TEMPLATES

To add any template to the toolbar, place the template into the folder `~/Library/Application Support/DEVONthink 3/Templates.noindex/Toolbar`. In order for the script to be available for use in the toolbar, you must quit and relaunch DEVONthink. Then Control-click the toolbar

of a DEVONthink window and choose *Customize Toolbar*. Drag your template into the toolbar and it's ready for use.

SMART RULES AND BATCH PROCESSING

Smart rules are smart groups, evolved. Built in the same style as smart groups, smart rules don't just show items matching criteria, they can act on them! From something as simple as adding (or changing) a color label, to modifying a filename then filing a document in another location, smart rules provide some powerful automation possibilities. And they're not just for the technically inclined. No programming experience is needed for almost every action available.

Smart rules are conceptually simple and can be summed up as follows: *When this event occurs > do this action > on items matched > in this location*. Smart rules are made of four parts:

- **A location:** This is where the smart rule will look for matching items.
- **Matching criteria:** Like a smart group, you can specify criteria to be matched. The smart rule will only act on the matched items.
- **An action:** This is the action the smart rule performs when the event occurs.
- **An event:** This is an event that causes an action to occur, e.g., an "On Quit" event. If used in a smart rule, a specified action would run when you quit DEVONthink.

CREATE A SMART RULE

Smart rules can be created in one of two ways:

- Click the + button at the bottom of the sidebar and choose *New Smart Rule*. The *Search in* dropdown will target the current location.
- Control-click an item in the sidebar and choose *New Smart Rule* from the context menu. This will specifically target that item in the *Search in* dropdown.

Note in either case you can change the *Search in* parameter to target other locations, including all open databases.

> Note: Smart rules are considered global objects and can be created only in the *Navigate* sidebar of a main window. If you want to create a smart rule for a group in the item list, choose *Data > Reveal* to display it in the sidebar.

When you create a new smart rule, you will be shown the predicate editor, just as you see with smart groups. Just follow these simple steps to define the parameters of the rule (with an example):

- **Name:** Give the rule a name, like *Label Edited Screencaptures*.
- **Location:** Set the *Search in* dropdown to target your desired location, like a group you add screen captures to. The more specific the better; a good idea is to use e.g., a database's inbox.
- **Matching:** Add any criteria to be matched, e.g., *Name begins with screen* and *Kind is Image*.
- **Event:** Choose an event to trigger the smart rule, like specifying *On Save* to run

the smart rule when matched items are saved in DEVONthink

- **Action:** Choose an action for the smart rule, perhaps *Change Name* to add "_edited" to the name.

This rule shown above would add "_edited" as a suffix to the name of any edited images whose name begins with "screen".

One step further, chained actions: If you hadn't noticed, there's a + button to the right of the action you specified. And yes, that means you can chain multiple actions in a smart rule! For example, we could add an action to open the edited imaged in the system default application after it has been renamed.

Understanding the input: In a smart rule, there always is only one input. You can't use conditionals or split the actions into a parallel process. A matched document is passed along through the entire process. So if you have a smart rule processing Markdown files and one of your actions is *Convert to Rich Text*, the resulting rich text file is created but not passed on to the next actions. The originally matched Markdown is still the input. However, there are two actions that allow switching the input: *Duplicate & Continue* and *Convert & Continue*. The items created by these actions become the input for the following actions. In our example, these actions would pass on the resulting rich text document as the input for the rest of the rule.

Order of operations: If you have more than one smart rule targeting the same location and/or types of files, they will run in the order they appear in the *Navigate* sidebar.

The topmost rule will execute first, then the second, and so on. Be aware one rule could make a change that affects whether an item is matched by subsequent rules. If it does, those rules logically will not process the items. Drag related smart rules into the order they should run or stop and reconsider how your rules are set up.

Chaining smart rules: Creating smart rules with more limited functions is often useful. For example, a rule that just files documents based on a certain custom attribute can be used on selected documents or by drag and drop to the rule. Now say you have another rule with more complex functions, e.g., moving a document into a database, doing OCR, then adding custom metadata. Provided it's using the same custom metadata, instead of adding the same actions as the previous rule, add the *Apply Rule* action and choose the filing smart rule. Now add another smart rule that should also file things based on the same custom metadata but in a different location. Use the *Apply Rule* action there as well. Now both rules can use the filing smart rule's actions without having to redundantly add their own actions. This is a powerful way to extend the functions of a smart rule while also using the simpler functions, when needed.

Importing and Exporting: Smart rules can be exported to the Finder, sent by email, and e.g., reimported to DEVONthink on another Mac. Drag a smart rule to the desktop to save it to a file or Control-click it and choose *Export*. Double-click a saved smart rule to import it, drag it into the sidebar, or Control-click into the sidebar and choose *Import*.

BATCH PROCESSING

Smart rules are useful for repetitious actions, usually happening in the background. For times when you need to make impromptu changes on specific items, e.g., prefixing a date to the name of several documents, batch processing is the best option.

Select a few documents to process, then choose *Tools > Batch Process*. A small but familiar action editor appears where you can create the chain of actions, just as you do with smart rules. Then press *OK* and the documents are modified. Note not every smart rule action is available in batch processing. However, for most actions the available ones are more than sufficient.

We hope this has given you a good overview of smart rules and batch processing. Please see the appendix for a complete list of available Events and Actions. For those interested in the *Apply Script* action, continue to the next section…

SMART RULE SCRIPTS

Smart Rule scripts are AppleScripts or JavaScripts run by an *Apply Script* action in a smart rule. These scripts allow you to extend the possibilities beyond the already powerful pre-defined actions. They also work with batch processing.

Note: Smart rule scripts will be executed based on the event handler in the specific rule. For testing, it can be useful to set the event to *On Demand*. This way you can select the rule to see its matches, then Control-click it and choose *Apply Rule* to run it and see the effects on the matched items.

Also be aware the effects of smart rules are very broad, i.e., they affect all the items they match. While you are testing, it's a good idea to put some limiting criterion in place. For example, instead of matching all images in all databases, try matching images in a specific group or only images that begin with "Screen".

ADDING AN EXTERNAL SCRIPT

To add an external script to a smart rule, add an *Apply Script* action and choose *External*. The next dropdown lists any available scripts in the `~/Library/Application Scripts/ com.devon-technologies.think3/Smart Rules` directory. Add any of your own scripts to this directory to make them available for any smart rule you define. Here is a list of the pre-installed scripts, for everyday use and your education:

- **Check Links:** Check if bookmarks are valid.
- **Close All Databases:** Closes all databases but the Global Inbox.
- **Download Bibliographic Metadata:** Attempts to retrieve the digital object identifier (DOI) of the document and set the title and metadata.
- **Move Into Database:** Moves indexed files into the database.
- **Move to External Folder:** Moves imported files out to the Finder when they're located in an indexed group.
- **Reminders - Next Week:** Set a reminder for a week from the current time and date.
- **Reminders - Remove:** Remove an applied reminder from the matched item(s).
- **Reminders - Tomorrow:** Set a reminder for the same time tomorrow.

- **Tags - Add Keywords:** Automatically adds Tags from the concordance of the matched file.
- **Tags - Assign:** Automatically adds tags, based on Apple's machine learning technology for images or hashtags and known tags in titles and content.

- **Downloads - Add Embedded Images:** Add embedded images to the *Download Manager*. Used with HTML-based files, e.g., web archives, etc.
- **Downloads - Add Linked Images:** Add linked images to the *Download Manager*. Used with HTML-based files, e.g., web archives, etc.
- **Downloads - Add Podcasts:** Add detected podcast links to the *Download Manager*. Used with podcast RSS feeds containing downloadable links.

ADDING AN EMBEDDED SCRIPT

There are times you may need to add some code for a specific situation. Similar to some other macOS utility applications, DEVONthink allows you to write a script directly in the smart rule's editor.

To write an embedded script for a smart rule, add or specify an *Apply Script* action and choose *AppleScript* or *JavaScript*. Click the *Edit Script* button and a popup will appear with a pre-built handler in place. Add your code as necessary, then press the compile button, the one with the stylized eye, to make sure it compiles correctly. If it does, you will see the code format itself subtly. If not, you will hear a system alert. When done, click outside the popup to dismiss it

Note: For those new to scripting, the repeat loop in the pre-built handler is a very common (and useful) code snippet for processing all files returned by a smart rule. In most cases, work inside that loop.

DEBUGGING

While there isn't a step-by-step logging of all actions in a smart rule, when you are using a script action, errors will be reported in the Log window or toolbar button.

TERMINOLOGY

Smart Rule scripts are defined by a specific handler: `on performSmartRule(var)`, where `var` is the variable representing items matched by the smart rule.

Example:
```
on performSmartRule(theRecords)
tell application id "DNtp"
repeat with theRecord in theRecords
if (name of theRecord as string) contains
"Piglet" then
set state of theRecord to true
end if
end repeat
end tell
end performSmartRule
```

APPLE MAIL RULES

When considering importing emails into your DEVONthink databases, the question of "automatic" email importing invariably comes up. While this isn't fully possible yet, there is a mechanism in Apple Mail that can provide some level of "automatic": *Mail Rules*.

Found in Apple Mail's *Settings > Rules*, these are a rules consisting of criteria to be matched and an associated action (similar to smart rules). As incoming emails are detected, Mail will check for matches in a rule and execute any actions you've specified in the rule.

One of the actions available is *Run AppleScript*. Selecting this option shows a dropdown with any installed Mail Rule scripts. These scripts are installed in `~/Library/Application Scripts/com.apple.mail` folder. If you write or obtain other scripts for use with Mail Rules, they can also be placed in this directory. The scripts provided by DEVONthink are:

- **Mail Rule - Add attachments to DEVONthink:** Adds the attachment of the message it acts on as separate documents to DEVONthink.
- **Mail Rule - Add links to DEVONthink:** Adds detected links in the messages as individual bookmarks in DEVONthink
- **Mail Rule - Add messages to DEVONthink:** Adds the messages it acts on to DEVONthink.
- **Mail Rule - File messages & attachments:** Adds the messages it acts on including all attachments to DEVONthink.
- **Mail Rule - File messages & attachments hierarchically:** Adds the messages it acts on including all attachments to DEVONthink, recreating the mailbox structure.

TERMINOLOGY

A full lesson on writing scripts for Mail Rules is beyond the scope of this help, but you can open and explore the installed scripts.

Do note there are two required handlers: `using terms from application "Mail"` and `on perform mail action with messages theMessages for rule theRule`, where `theMessages` is a variable representing the items matched by the rule. Here's a simple example:

> **Example:**
> ```
> using terms from application "Mail"
> on perform mail action with messages
> theMessages for rule theRule
> tell application "Mail"
> repeat with thisMessage in theMessages
> display alert "" & (subject of
> thisMessage)
> end repeat
> end tell
> end perform mail action with messages
> end using terms from
> ```

> Note: Mail Rules are controlled by Apple Mail, not DEVONthink. While they generally behave as expected, we can't control whether the rules will be triggered in Apple Mail.

APPLICATION SCRIPTS

AppleScript is perfectly suited for integrating different applications, interchanging information, and creating workflows. DEVONthink comes with a number of scripts that exchange information between DEVONthink and other AppleScript supporting applications, like Safari or Mail.

The [Script Menu Extra Scripts](#) provided by DEVONthink are installed in an application-specific folder in `~/Library/Scripts/Applications`, e.g., `~/Library/Scripts/Applications/Safari`. These scripts are accessible from the global scripts menu in the menu bar at the top of your screen while you're in the specific application.

MAIL SCRIPTS

Importing email into your DEVONthink databases is a possible use of AppleScript. Using AppleScript-enabled email applications, especially those with a robust scripting dictionary, increases the potential for processing emails. This can help you quickly file those emails directly into DEVONthink.

DEVONthink comes with scripts for Apple Mail, Microsoft Entourage, and Microsoft Outlook. Just select a message or mailbox in a supported email application and choose the desired script from the global scripts menu. DEVONthink provides the following scripts:

- **Add attachment(s) to DEVONthink:** Adds the attachments of selected emails to DEVONthink.
- **Add mailbox(es) to DEVONthink:** Adds the selected mailboxes to DEVONthink.
- **Add mailbox(es) & attachments to DEVONthink:** Adds the selected mailboxes to DEVONthink. Attachments are imported separately.
- **Add message(s) to DEVONthink:** Adds the selected mailboxes to DEVONthink.
- **Add message(s) & attachments to DEVONthink:** Adds the selected mailboxes

to DEVONthink. Attachments are imported separately.

> Note: The import of entire mailboxes via AppleScript can be a resource-intensive process. Use the Apple Mail plugin for a more robust experience importing mailboxes.

WEB BROWSERS

Depending on the capabilities of the web browser you're using, you may be able to use application scripts. We have included a handful of simple scripts that can be run while browsing in Safari or [DEVONagent](#).

- **Add abstracts to DEVONthink:** Creates a [sheet](#) containing information about items in a DEVONagent search. This includes the title, score, summary, and URL of each result. (DEVONagent only)
- **Add linked images to DEVONthink:** Detects images on the current page and adds them to your database.
- **Add tabs to DEVONthink:** Adds bookmarks for active tabs the browser.

- **Add linked images to DEVONthink's downloads:** Detects images on the current page and adds them to DEVONthink's *Download Manager*.
- **Add links to DEVONthink's downloads:** Detects URLs on the current page and adds them to DEVONthink's *Download Manager*.

OTHER APPLICATIONS

Obviously we haven't covered all the possible applications or scenarios on your machine, and we are sure you have ideas we haven't thought of. If you have an application you'd

like to integrate with DEVONthink, check if it has an [AppleScript dictionary](#). If it does, the potential exists to communicate between the applications. But also be aware the commands, elements, and properties you can work with are coded by the developer of those applications.

FOLDER ACTIONS

Folder actions are scripts that you can attach to folders in the Finder. These act on all items you add to these "hot folders." When you add items, the operating system detects the added files and runs any folder actions attached to the folder.

The actions supplied by DEVONthink are installed in `~/Library/Scripts/Folder Action Scripts`, and you can add your own scripts to this directory, as needed. For everyday use and exploration, here are the folder action scripts provided by DEVONthink:

- **DEVONthink - Import:** Imports files into your databases.
- **DEVONthink - Import & Delete:** Imports files into your database, and moves the files to the trash afterwards.
- **DEVONthink - Import to selected group:** Imports files to the currently selected group.

- **DEVONthink - Index:** Index files to your database, creating links to the original items in the Finder.
- **DEVONthink - Index to selected group:** Index files to the currently selected group in your database.
- **DEVONthink - Import, OCR & Delete:** Imports files into your database, converts them to searchable PDFs if necessary, and moves the files to the trash afterwards.

ATTACHING A FOLDER ACTION

To attach a folder action script to a folder, do the following:

- Control-click a folder in the Finder.
- Select *Services > Folder Actions Setup* from the context menu.
- From the list of available actions, select the folder action script click *Attach*.

Manage folder actions: To manage all your folder actions, Control-click a folder and choose *Services > Folder Actions Setup* from the context menu. Use the Folder Actions Setup utility to see which folders have scripts attached, and to remove folder actions from folders.

> Note: If you are running macOS Mojave, you will be prompted to allow the Folder Actions Setup application to run. This notification is controlled by the operating system, not DEVONthink.

TERMINOLOGY

While we can't provide specific training on how to create folder actions, check out [Apple's documentation](#). However, the `on adding folder items to folderVariable`

`after receiving filesVariable` is the handler most commonly used in our folder action scripts. Here is a simple example:

> **Example:**
> ```
> on adding folder items to theFolder after
> receiving theFiles
> repeat with thisFile in theFiles
> tell application id "DNtp"
> set newRecord to import thisFile to
> incoming group
> if exists newRecord then tell application
> "Finder" to delete thisFile
> end tell
> end repeat
> end adding folder items to
> ```

> Note: Folder actions, like any computer processes, are treated very literally. When processing files with a folder action, it's best to move or delete the files from the watched folder. This keeps the action from trying to reprocess files.

SHORTCUTS AND AUTOMATOR

Apple's Shortcuts and Automator applications were created to help non-programmers take some control of their machines. They allow you to visually string together simple steps to create an automated process. Though much more limited due to their linear nature and lack of debugging tools, they may still be useful for some situations. Additionally, they let you create other types of items like workflows, services, or Quick Actions.

DEVONthink doesn't offer specific Shortcut or Automator actions. However, as DEVONthink has a deep and robust scripting dictionary, the *Run AppleScript* action in those applications opens up some

automation opportunities. The key to integration with DEVONthink is passing or receiving file paths via scripting.

> Note: While Shortcuts is newer, the tips presented here generally apply to both applications. And while we may investigate DEVONthink-specific questions regarding Shortcuts or Automator, we do not offer support specifically for them.

GETTING INFORMATION INTO DEVONTHINK
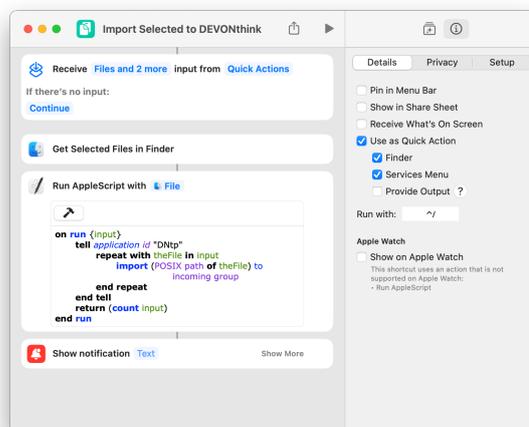
As an example, importing selected files in the Finder can be accomplished by passing file paths to DEVONthink. To do this, use a *Get Selected Files in Finder* action before this *Run AppleScript* action:

> **Example:**
> ```
> on run {input}
> tell application id "DNtp"
> repeat with thisFile in input
> import (POSIX path of thisFile) to
> incoming group
> end repeat
> end tell
> end run
> ```

SENDING INFORMATION OUT OF DEVONTHINK

For passing items from DEVONthink, this *Run AppleScript* action provides a list of file paths to be processed. This action should be placed before the third-party application's actions.

Example:
```
on run {}
tell application id "DNtp"
if (selected records) is not {} then
set fileList to {}
repeat with thisRecord in (selected
records)
if (path of theRecord is not "") then
copy ((path of theRecord) as POSIX file)
to end of fileList
end if
end repeat
end if
if fileList is not {} then return fileList
end tell
end run
```
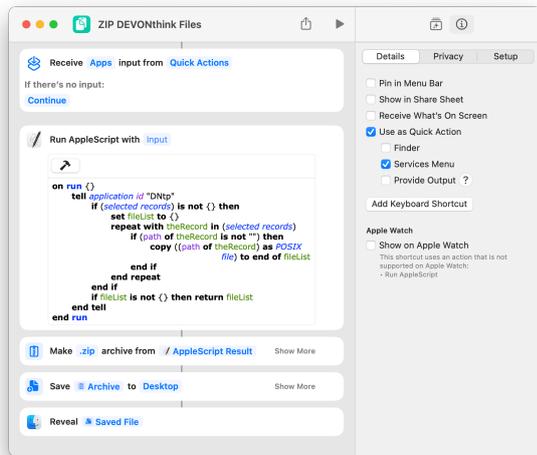
Note: In Shortcuts, the records' path likely needs to be passed as a `POSIX file`. Automator prefers POSIX paths, so use `copy (path of thisRecord) to end of`

`fileList` instead. Also, you need to ensure the selected items are not groups or smart groups as they don't exist in the filesystem.

WARNING: Be very cautious when using the paths from DEVONthink. Actions like moving, deleting, renaming etc. would compromise your database. Immediately following the AppleScript action, use a *Save* action with the *AppleScript Result* in Shortcuts or the *Copy Finder Items* action in Automator to keep from modifying the underlying files in your database.

ITEM LINKS

Every database, group, or document in your DEVONthink database has a URL (uniform resource locator) associated with it. While web URLs typically begin with `http://` or `https://`, DEVONthink's URLs take the form of `x-devonthink-item://` followed by a long alphanumeric ID. For PDFs, the link can contain a reference to a specific page. For audio and video, a reference to the current playback time. And for RTFs, you can get a reference to a specific paragraph in the document. These links can be used in any file type or application that supports live hyperlinks, e.g., the notes fields of OmniFocus tasks. This allows you to access DEVONthink documents as easily as clicking a link in a web browser.

You can get this item link manually by selecting a document or group and choosing *Edit > Copy Item Link*. In addition you can manually extend the copied URL with the following parameters:

- **app:** Used in conjunction with the `openexternally` parameter, specify the name of the app to open the referenced file with, e.g., `x-devonthink-item://E35A4AFF-BD90-4131-9D54-62849E0EF4DE?openexternally=1&app=preview`.
- **length:** Specify the number of characters from the `start` parameter. Used in selection links.
- **openexternally:** Opens the referenced item in the system default application, e.g., opening a PDF in Preview. Used with a value of *1*, e.g., `openexternally=1`.
- **opentab:** Opens the referenced item in a new tab in the current main window if a document is already being viewed. Used with a value of *1*, e.g., `opentab=1`
- **page:** Opens a PDF to the specified page. Usage: `page=<integer>`.
- **reveal:** Reveals an item in the item list instead of opening it in a new window. Usage: `reveal=1`.
- **search:** Directly jumps to the first occurrence of the search string in the specified document. Usage: `search=<string>`.
- **start:** Specify the starting character on the current page. Used in selection links.
- **time:** Directly jumps to the specified time in seconds in a video or audio document. Usage: `time=<float>`.

Example:
```
x-devonthink-item://<recordID>?reveal=1
x-devonthink-item://<pdfID>?page=5
x-devonthink-item://<textFileID>?
search=iPad%20Pro
x-devonthink-item://<movieID>?time=43.5
```

Note: The first parameter after the ID is always added after a question mark (?), additional ones after an ampersand (&), and any values must be percent-encoded.

TERMINOLOGY

Manually getting item links can be useful for some hard-coded cases, but there are many times you want to get them programmatically. There are two AppleScript properties for a `record` related to item links:

- **reference URL:** This is the item link as described above.
- **UUID:** This is the unique identifier of the item, i.e., the long alpha-numeric string in the reference URL.

Here is an example of getting and using an item link to create a Markdown compliant link on the clipboard:

Example:
```
tell application "DNtp"
set recordName to name of content record
set recordURL to reference URL of content
record
set the clipboard to ("[" & recordName &
"](" & recordURL & ")")
end tell
```

The terminology for using item links can depend on the capabilities of the application you're scripting. Here is an example, using a hard-coded URL, with an application that can open URLs:

Example:
```
tell application "Opera"
tell window 1
make new tab with properties {URL:"x-devonthink-item://929D101B-35AC-474C-801C-D8818C48DB80?line=125"}
end tell
```

```
end tell
```

P.S.: For the shell scripters, the URLs can be used with an `open` command.

URL COMMANDS

URL commands are a type of [item link](#) that don't merely point to an existing file, they issue some special commands to DEVONthink. Though not as powerful as AppleScript, these commands can be used in special circumstances.

TERMINOLOGY

The URLs are constructed from a single command and optional parameters, with the following format:

```
x-devonthink://<command>?
<parameter=value&parameter=value&...>
```

Note: The first parameter after the ID is always added after a question mark (?), additional ones after an ampersand (&), and any values must be percent-encoded.

Listed below are the commands and parameters available:

Commands:

- **createFormattedNote:** Creates a formatted note.
- **createHTML:** Creates a new HTML document.
- **createMarkdown:** Creates a Markdown document.
- **createPDF:** Creates a PDF.
- **createRTF:** Creates a rich text document.
- **createWebArchive:** Creates a web archive.
- **createBookmark:** Creates a new bookmark.

Note: Use the `location` parameter set to a URL with the commands above to download the page in the specified format.

- **createGroup:** Creates a group.
- **createText:** Creates a new plain text document.
- **clip:** Opens the Clip to DEVONthink panel.
- **note:** Opens the Take Note panel.
- **search:** Initiates a search in the open databases.

Parameters:

- **title:** The title of the item to be created (string).
- **comment:** A Comment to be added (string).
- **location:** The URL linking to the content, e.g., the URL of the website for the bookmark (URL).
- **tags:** Tags to be added (comma separated strings).
- **destination:** The UUID of a group where the item shall be created (string).
- **source:** The HTML content for HTML documents (string, only used by `createHTML` and `createFormattedNotes`).
- **text:** The text content for text documents (string, used by `createText` and `createMarkdown`).
- **width:** The page width (integer, only used by `createPDF`).
- **paginated:** Paginate the created PDF (boolean, only used by `createPDF`).
- **hide:** Hide and deactivate application after executing the comment (boolean).
- **noselector:** Skip group selector (boolean).
- **query:** The query to search for (string, only used by `search`).

- **reader:** Post-process the page (integer, O = no post-processing, any other value = post-process).
- **referrer:** The URL that referred to the item (URL).
- **selection:** The selected text (string, only used by `createRTF`).

```
x-devonthink://createRTF?title=New
%20bookmark&location=http%3A%2F
%2Fwww.devontechnologies.com&noselector=1
```

Note: These are not x-callback-urls. An x-callback-url is a specific type of URL scheme that returns a value to the calling application.

APPENDIX

In the appendices you will find additional information that helps you getting familiar with DEVONthink, such as a glossary of commonly used terms, a listing of the Boolean operators used in searches, commonly found context menu items, and much more.

GLOSSARY

Become familiar with these terms to get the most out of working with DEVONthink.

MOUSE & TRACKPAD

In this documentation, *secondary click* refers to clicking an element with either the *Control* key held, the right mouse key, or clicking with two fingers on a trackpad. You can configure your mouse and trackpad behavior, so a secondary click could be defined differently on your system. In this case, clicking with the *Control* key held works always.

KEYBOARD SYMBOLS

- ⌘ The *Command* key, usually next to the *Space* bar.
- ⌥ The *Option* key.
- ⌃ The *Control* key (usually labeled with "ctrl").
- ⇧ The *Shift* key.
- ⎋ The *Escape* key (usually labeled with "esc").
- ⇥ The *Tab* key.
- ↩ The *Return* key.

INTERFACE ELEMENTS

- **Bars:** Smaller sections of a window providing specialized information or controls, e.g., the Information Bar found just above the item listing. It shows information about the selection as well as buttons to sort or change the view.
- **Context menu:** The menu that appears when you *Control-click* something. The context menu gives you access to frequently used commands that deal directly with the clicked object. Specific context menu items are discussed in their respective sections, but there is a list of commonly seen commands in the Context Menu Items section of this appendix.
- **Inspectors:** Specialized panes at the right of a main window, providing information

about the current selection as well as functions like See Also & Classify.

- **Item list:** The list of items in the current location, viewable as a list, icons, columns, or Cover Flow. Items can be documents, groups, or smart groups.
- **Sidebar:** The panes found at the left side of a main window, comprised of the *Navigate*, *Reading List*, *Import*, and *Extras* panes.
- **View/Edit pane:** A pane of the DEVONthink main and document windows that lets you view a document or, when possible, edit it. The view/edit pane displays the content of your documents depending on their type. See also p. 82ff
- **View:** The layout for a DEVONthink main window. You can change the layout using the commands found in the *View* menu.
- **Window:** DEVONthink uses three different types of windows: main, document, and other. Main windows show lists of items and, in some views, also the contents of the selected document, whereas document windows can be opened for individual documents.

DOCUMENTS & GROUPS

- **Database:** A collection of all documents stored in DEVONthink. You can create and open as many databases as you like.
- **Document:** A file in the database; for example, a plain or RTF text, a PDF, or an image (.jpg, .tiff, .png, etc.). Technically a document is an entry in a database with text, RTF, or image content, sometimes simply referred to as "content".
- **Default destination:** The default destination group for incoming data. Set in *Settings > Files > Import.*

- **Duplicate:** A copy of a file, either explicitly created or detected by DEVONthink's AI.
- **Group:** A collection of documents or other groups inside the database. Similar in appearance and behavior to a folder in the Finder. See also p. 146ff
- **Global Inbox:** A special database serving as a destination for incoming data. The *Global Inbox* is always opened when DEVONthink is started and accessible through the sidebar. The *Global Inbox* can be set as the default destination in *Settings > Files > Import*.
- **Inbox:** A special group for data coming in to a database. Every database has an *Inbox* group.
- **News feed:** Also referred to as *RSS*, a news feed is like a web page, but split into multiple articles. A feed reader or web browser can split the feed "page" into its parts and show each of them as a separate news item and/or store it in a local database. DEVONthink stores feeds in a database and displays them like a group. The contents are updated live from the internet as the connected feed changes. Older news bits are kept, while fresh news bits are added and marked as unread. When you add a bookmark that points a feed, DEVONthink tries to add it as a proper feed document if possible.
- **Replicant:** A document or a group that appears in more than one place in the database. Unlike an alias in the file system, a replicant is not a real document pointing to another file (usually the original); rather it is a second entry in the table of contents for the very same document. Consequently, there is no original; when

you replicate a document you'll end up with two replicants.

- **Sheet:** A collection of records or structured sets of data, presented in a spreadsheet style, similar to data viewed in Apple Numbers or Microsoft Excel. Alternatively, the data can be displayed in form view, similar to browsing records in, e.g., FileMaker.
- **Smart group:** A special type of group with a set of search criteria saved with it. This is similar to "Saved Search" folders in the Finder. Every time you visit this smart group, DEVONthink runs the attached search and displays it as the content of the group. DEVONthink creates a number of pre-defined smart groups when you create a new database.
- **Trash:** A temporary location in a database for deleted files. Similar to the Trash in the Finder, all trashed items are stored until you explicitly delete them using *DEVONthink > Empty Trash*.

TAGS

- **Group tag:** Groups within a database that apply their name as tags to their contents. Items moved out of these groups will not retain the group tags. Group tags appear grey in all tag lists.
- **Ordinary tag:** Tags created through the *Tag* bar or other means are created in a special top-level *Tags* group. They are called "ordinary tags" and appear blue in all tag lists.

See the Iconology section for icons specific to these two items.

ITEM PROPERTIES

- **Flagged/Unflagged:** Items can be checked or unchecked for your personal use, e.g., for creating a to-do list, maintaining a shopping list, or writing a list of project tasks.
- **Locked/Unlocked:** Items can be locked to keep them from being unintentionally deleted (groups, documents) or modified (documents).
- **Read/Unread:** Items can be marked read or unread, which is useful for captured or automatically downloaded news items or documents that you want to read later. Both unread items and groups containing unread items are shown in bold.
- **UUID:** Each database, group, or document in DEVONthink receives a unique identifier (UUID) when it's created. This is a read-only alphanumeric string that refers only to the particular item. The UUID allows you to reference an item regardless if its location or name changes, and is usually found in item links.

See the Iconology section for icons specific to the *flagged*, *locked*, or *unread* states.

SYNCHRONIZATION

- **Sync location:** Sync locations are used to keep your databases on all your devices in sync. They summarize all information about which databases to sync through what kind of connection (e.g., direct connections to DEVONthink on a Mac, WebDAV, CloudMe, Dropbox etc.) and with which sync store.
- **Bonjour (Direct connection):** A sync method for syncing one device to another Mac or mobile device running DEVONthink

or DEVONthink To Go, respectively. Unlike other sync methods, there is no intermediary storage location for the sync data. It is direct - device to device.

- **Sync store:** A sync store is a special folder containing sync data. These can be direct, local, e.g., on your Mac or a thumb drive, or remote, as used with cloud services.
- **Encryption key:** A user-defined word used to "scramble" or "unscramble" your sync data when syncing. When used, your sync data is stored in an encrypted state in the sync store.
- **Local database:** A database that exists and is open on this device.
- **Remote database:** A database that is not open on this device, or exists at the sync location, e.g., on Dropbox, but has not been downloaded to this device.
- **Pending document:** A document for which only the metadata is locally available. This happens when you choose not to synchronize indexed files for the sync location.
- **WebDAV:** A type of web server used by some cloud services, some network attached storage devices, or running locally. It can usually be used by DEVONthink for syncing.

ICONOLOGY

Additional icons behind item names, e.g., in *main windows*, indicate that the item has been indexed instead of imported, is locked, has a comment or annotation attached, is encrypted, e.g., PDFs or encrypted databases, or has a triggered script attached. Groups also serving as tags show a tag icon. Depending on your preferences, replicants,

duplicates, or replicated duplicates are indicated with a little grey icon instead of appearing in color.

- ☞ Item has encryption applied, e.g., encrypted PDFs, and encrypted database, or an encryption key has been specified for a sync location in *Settings > Sync*.
- ◉ Item is unread.
- ⚑ Item has been flagged.
- ▣ Item is indexed, not imported.
- 🔒 Item is locked.
- ☐ Item has a comment.
- ✦ Item has an annotation.
- 🔔 Item has a reminder set.
- ▤ Item has outgoing item links.
- ▤ Item has incoming item links.
- ⚲ Item has a script attached.
- ⬡ Group is a tag, too.
- 📎 Item has an attachment (email messages only).
- ⟳ Item is synced but its content is not (yet) downloaded.

- ▢ Item is a duplicate
- ▥ Item has one or more replicant(s)
- ▥ Item is a duplicate, but also has one or more replicant(s)

TOOLBAR ITEMS

DEVONthink provides a wide variety of toolbar items, giving you quick "push-button" access to many everyday tools.

DEFAULT ITEMS

The following toolbar buttons are available in the default set you see when you first launch DEVONthink:

- ▫ **Sidebar:** Show and hide the global sidebar.
- ▤ **Preview: None:** Hides the document preview.
- ▤ **Preview: Standard:** Shows the document preview below the item listing.
- ▫ **Preview: Widescreen:** Shows the document preview besides the item listing.
- ✽ **Actions:** Contains the context menu for items selected in the item listing..
- ＋ **New:** Adds documents in DEVONthink-native formats. Similar to *Data > New*.
- ⏏ **Open:** Opens the current item in a DEVONthink window if possible.
- ⎘ **Open externally:** Open the current document in the system default application.
- ⇪ **Share:** Opens the macOS Share menu for the selected items. This does not apply to groups.
- ⚑ **Mark: Flagged:** Changes the flagged state of the selected item.
- ◉ **Mark: Read:** Changes the read statue of the selected item.
- ⚿ **Mark: Locked:** Changes the locked state of the selected item.
- ⚊ **Label:** Changes the label color of the selected item.
  Search: This is the main search bar, accessing all or specific groups and databases.
- ⟳ **Synchronize:** Initiates a manual sync of the current database. See also p. 183ff
- ⓘ **Get Info:** Opens a popup from the button displaying a number of commonly used inspectors.
- ▭ **Show/Hide Inspectors:** Shows or hides the *Inspector* panes.
- ▭ **Show/Hide Tags:** Shows or hides the *Tags* bar under a document's preview.

ADDITIONAL ITEMS

In addition to the default set, there are many other specific buttons available, shown in the essential order found in *View > Customize Toolbar*:

- ◈ **Scripts:** Provides access to the contents of the *Scripts* menu.
- ◉ **Quick Look:** Opens a Quick Look preview for the selected document.
- ⊕ **Zoom In:** Zooms into the current item.
- ⊖ **Actual Size:** Zooms the current item to the default zoom level.
- ⊖ **Zoom Out:** Zooms out of the current item.
- ▣ **Zoom to Fit:** Sets the magnification of the current item to fit the bounds of the view/edit pane.
- ▥ **Zoom to Width:** Sets the magnification of the current item to the width of the view/edit pane.
- ⛶ **Full Screen:** Displays the current document in DEVONthink's full screen mode.
- ▯ **Groups: Group:** Creates a new group in the current location.
- ⚙ **Groups: Smart Group:** Creates a new smart group in the current location.
- ▤ **Group:** Groups the selected items into a new group.
- ▤ **Ungroup:** Ungroups the selected group and deletes the now-deserted empty group.
- ☰ **Classify:** Attempts to classify the current item.
- ☰ **Plain Text:** Creates a plain text file in the current location.

- ⊞ **Rich Text:** Creates a rich text file in the current location.

- ⊞ **Markdown Text:** Creates a Markdown file in the current location.

- ⊞ **Formatted Note:** Creates a formatted note in the current location.

- ⊞ **Sheet:** Creates a sheet in the current location.

- ⊘ **Bookmark:** Create a bookmark in the current location.

- ⊘ **Launch URL:** Opens a URL associated with the current item in the system default browser.

- ⊟ **Save:** Explicitly save changes to a document.

- ⊟ **Delete:** Moves the current item to the database's trash.

- ⊟ **Print:** Prints the selected document. If a document cannot be printed, the item listing will be printed.

- ⤷ **Import:** Imports files into the current location.

- ⊡ **Export:** Provides access to the contents of the *File > Export* menu.

- ⊞ **Update:** Manually updates indexed items in a database.

- ⊞ **Show in Finder:** Reveals a file in its location in the Finder.

- ⊙ **Reveal:** Reveals a file in smart groups or search results in its current location.

- ⊞ **Merge:** Merges multiple files into one, leaving the originals intact.

- ⊞ **Merge and Delete:** Merge multiple files into one, putting the originals in the database's trash.

- ⊗ **Optimize:** Does an internal optimization and backup of a database's metadata.

- ⊗ **Verify:** Checks the integrity of the database and repairs items it can.

- ⚠ **Log:** Opens a popover showing available messages from the Log window.

- ⊠ **Send by Email:** Creates a new message in your default email app and attaches selected items.

- ⊙ **Synchronize All:** Initiates a manual sync of all open and actively syncing databases.

- ⊞ **Take Note:** Opens the *Take Note* view, either in the *Sorter* or a *Take Note* panel.

- ⊟ **Imprinter:** Provides access to any imprints available in the *Tools > Imprinter* menu.

- Ⓐ **OCR:** Runs OCR on a compatible file, e.g., PDFs or images, producing the selected output type.

> Note:
>
> **Reveal:** Be cautious with this button. When used on imported files, it will reveal them in the internals of the database. You do not want to modify these internal files in the Finder. This option is best used on indexed files.
>
> **Verify & Repair:** Please refer to the troubleshooting chapter for information on database maintenance and repairs.
>
> **Send by Email:** The ability to add the attachments depends on the inter-application capabilities of the email application. If it doesn't provide support for this, you may be able to drag documents into draft messages or the email application's dock icon.
>
> Some items are also available as a compound toolbar icon.

CUSTOM ITEMS

If you are creating scripts or templates, they will be available to add to the toolbar after quitting and relaunching DEVONthink. See the appropriate sections for information on where to save these files for use in the toolbar.

KEYBOARD SHORTCUTS

Keyboard shortcuts make using DEVONthink much more efficient for many people. Some of the following shortcuts are common to most Mac applications; others are only available in DEVONthink. In addition, many menu commands have keyboard shortcuts. These are shown directly in the menu.

> Note: You can change the shortcuts for menu commands in *System Settings > Keyboard > Shortcuts > App Shortcuts.*

WINDOWS

- **Control-Tilde (~):** Cycles through open application windows. This is a common macOS shortcut.
- **Control-Tab:** Cycles focus between the item list, view/edit pane, and the Tags bar or Inspectors (if visible).
- **Escape:** Cancels processes, closes dialogs or Quick Look previews, etc., depending on the context.
- **Command-}:** Cycles to the next tab.
- **Command-{:** Cycles to the previous tab.

> Note: Hold ⇧ to cycle in reverse order.

DOCUMENT LISTS

Navigating items:

- **Up/Down arrow:** Navigates up and down in all views. Use ⇧ to select multiple entries.
- **Left/Right arrow:** Expands or collapses the selected groups in horizontal split, vertical split or List views, or navigates to previous/next item in other views.
- **Option-click (the triangle in front of a group):** Expands or collapses all groups that are contained within this group as well.
- **Option-Left/Right arrow:** Expands or collapses the selected groups and all their children the item list.

Selecting items:

- **Shift-click:** Selects consecutive items.
- **Shift-arrow:** Extends the next consecutive item to the current selection.
- **Command-click:** Adds a non-consecutive item to the selection.

Manipulating items:

- **Return:** Renames documents.
- **Backspace:** Deletes selected items.
- **Command-Drag:** When dragging items from the Finder, this moves, not copies, the file into the database.
- **Option-drag:** Duplicates items to the drag destination instead of moving it.
- **Command-Option-drag:** Creates replicants for the items at the drag destination. Dragging items from the Finder to DEVONthink with ⌥⌘ pressed indexes the item. Dragging items into documents with ⌥⌘ held inserts a link to the item.

Item List:

- **Command-Shift-O:** Opens a selected document in the system default application.
- **Tab:** Jumps to the first or next editable column when using *View > List*.
- **Space:** Opens the standard Quick Look panel showing a preview of the selected items.
- **Option-Space:** Opens a full screen Quick Look slideshow.
- **Option-bracket:** Using *[* and *]*, goes backwards and forwards through the visited locations.

VIEW/EDIT PANE

- **Home/End:** Goes to beginning of, or end of, any view.
- **Page up/down:** Scrolls one page up and down in any view.
- **Space/Shift-Space:** Scrolls one page down or up in non-editable views, e.g., web pages, images, or PDF documents.
- **Command-click:** Opens the target of a link in a new tab or separate window.
- **Command-Option-drag:** Inserts a cross-link for groups or documents dropped into a rich text document. Dragging files or folders from the Finder to a rich text document with ⌥⌘ pressed creates links to them.
- **Command-Shift-click:** Opens a link in a new tab and activates it. This requires enabling tabbed browsing in *Settings > General*.
- **Option-bracket:** Using *[* and *]*, goes backwards and forwards through the documents or visited web pages .
- **Option-drag:** Selects text using a rectangular selection ribbon.

- **Option-click (a link):** For HTML-based files, adds the clicked URL to the Download Manager panel.
- **Option-click (a word):** Initiates a search with the clicked word as the search term.
- **Shift-arrow:** Expands or contracts the current text selection.

THE SORTER

General Note Creation and Clipping:

- **Command-S:** Saves the entered data. Equivalent to clicking *Add*.
- **Escape:** Clears any entered data. Equivalent to pressing the retreating circle icon.

Voice and Video Note:

- **Spacebar:** Start and stop recording.

Screen Capture:

- **Command-1:** Capture the entire window.
- **Command-2:** Capture a highlighted window.
- **Command-3:** Capture a marqueed area.

Web Clip:

- **Command-1:** Clips from the default browser.
- **Command-2:** Clips from a URL you've copied to the clipboard.
- **Command-3:** Type a URL to clip and any associated data, e.g., comments, tags, etc..

Clip to DEVONthink:

- **Command-F:** Toggles the *Clutter-free* option.

SHEETS

- **Return:** Moves one cell down for editing.
- **Shift-Return:** Moves one cell up for editing.
- **Tab:** Moves one cell to the right for editing.
- **Shift-Tab:** Moves one cell to the left for editing.
- **Arrows:** Moves the editing selection.
- **Escape:** Stops editing.

PDFS

- **+:** Zooms in.
- **-:** Zooms out.
- **Command-drag:** Scrolls the visible area with the mouse.

IMAGES

- **+:** Zooms in.
- **-:** Zooms out.

MULTIMEDIA

- **Spacebar:** Start and stop playback.
- **Left/Right Arrows:** Move forward or backward one frame or .25 second.
- **Option-Left/Right Arrows:** Jump to the beginning or end of the file.
- **Shift-Left/Right Arrows:** Move forward or backward in 15 second intervals. The *Shift*-interval is customizable in the hidden preferences.
- **Command-Left/Right Arrows:** Change forward or reverse playback speeds.
- **Option-Forward/Reverse buttons:** Hold the *Option* key and click the forward or reverse

buttons to change playback speeds in .1 increments, e.g., 2.1, 2.2, etc.

- **Up/Down Arrows:** Adjust the playback volume. Hold *Option* to switch between mute and full volume.

> Note: These keys operate when a multimedia file is the active document. They are not global controls, i.e., they will have no effect on an audio file playing in a minimized window.

CONTEXT MENU ITEMS

DEVONthink also provides many commands in context menu items, shown when you Control-click on elements in the application. Many of the context menu items are also found in DEVONthink's menus. Below is a list of common menu items you'll find in the context menus for documents and windows.

DOCUMENT CONTENTS

When you Control-click in the contents of documents, you will see a context menu with commands and options. The items shown are related to the file type and if you're interacting with a selection in the document. Specific items, e.g., commands relating only to PDFs, are covered in their respective sections.

In editable documents:

- **Add to Favorites:** Adds the current document to the Favorites.
- **Add to Reading List:** Adds the current document to the Reading List.
- **Services:** Displays the macOS Services menu.

Text or links in text:

- **Add Link to Reading List:** Adds a link to the *Reading List*.
- **Add Link:** Allows you to enter a URL for the selected text, converting the text to an active link.
- **Add tag [word]:** Tags the document with the selected word (only available if the word is not already a tag of the document).
- **Convert to Item Link:** Converts a selected WikiLink into an item link. See also p. 34ff An alternate command, available when holding the ⌥ key, *Convert All to Item Links* converts all WikiLinks in the current document into item links. These commands only apply to plain text, rich text, and Markdown documents.
- **Copy Link:** Copies a clicked link to the clipboard (only available for selected links).
- **Edit Link:** Edits the destination of a selected link. Selecting this option allows you to remove the link as well.
- **Insert Link To:** Inserts a link to an item you select in the submenu (only available when no text is selected).
- **Insert Placeholder:** Inserts a predefined placeholder or one specified as custom metadata in Settings > Data.
- **Highlight:** Highlights the selection with the current highlight color. Using this command on a selection again removes the highlighting.
- **Link To:** Makes the selected piece of text a cross-link and links it directly to the group or document you select in the submenu.
- **Look Up [word]:** Looks the selected text up in macOS's Dictionary.
- **Make Link:** Makes the selected piece of text a WikiLink. The destination of the

WikiLink is a document with the same name as the selected text. If no document with that name exists, clicking the created link creates it using the template you have set in the Settings > WikiLinks.

- **Open Link in Browser:** Opens the selected link in the default browser or application.
- **Open Link in DEVONagent:** Opens the selected link in a DEVONagent Pro browser window.
- **Open Link in New Tab:** Opens the selected link in a new tab in DEVONthink.
- **Open Link in PhotoStickies:** Opens a link in PhotoStickies.
- **Open Link:** Opens the selected link.
- **Quick Look Attachments:** Opens a QuickLook window for both item links and WikiLinks in plain text, rich text, and Markdown documents. Selecting a text block with multiple links opens a QuickLook window for all detected links.
- **Remove Link:** Use this to remove the link status of selected text.
- **Search with Google:** Searches for the selected text in Google.
- **Search [word]/Selected Phrase:** Searches for the selected word or phrase in your open databases.
- **See Related Text:** Displayed like search results, this shows a list of documents related to the selected text passage. This option is only available when more than one word is selected.
- **See [word]:** Opens a drawer with documents related to the selected word.

- **Set Name As:** Sets the name of the document to the selected piece of text (needs to be less than 256 characters).
- **Share:** Shares selected text via the available sharing extensions.

- **Add Link to Downloads:** Adds a link to the *Download Manager*.

Images and PDF documents:

- **Actual Size:** Displays the document at its actual size. Uses also the resolution information contained in the file.
- **All Pixels:** Zooms the image so that one image pixel equals one pixel on the screen.
- **Zoom In/Out:** Zooms in or out of the document, or displays it in its actual size.
- **Zoom To Fit:** Zooms the image so that it fits into the view/edit pane or the document window.
- **Zoom To Width:** Zooms the image to fit the width of the view/edit pane or the document window.

ITEM LIST

These context menu items are commonly shown when you ⌃-click items in a main window's item lists. In items lists, the commands are also often available in the Actions toolbar button. Some of these commands are also seen in the See Also & Classify Inspector pane.

- **Add To:** Commands in this submenu add the currently selected documents to your *Favorites* or the *Reading List*.
- **Apply Rules:** Runs a chosen smart rule on selected items matching the location and criteria of the rule.

- **Convert:** This submenu displays options for converting from one file type to another. The options shown here are dependent on the type of file selected.
- **Copy Item Link:** Copies a link to the current item.
- **Copy URL:** Copies the URL of the selected document to the clipboard. This only appears when one document is selected.
- **Duplicate To:** Duplicates the selected item to the group you select from the submenu.
- **Get Info:** Opens an popup containing more detailed information about the currently selected file or group.
- **Group Items:** Groups multiple selected items in an item list.
- **Label:** Changes the label of the selected item.
- **Launch URL:** Opens the URL in the selected item's URL field. Hold the ⌥ Option key to choose *Launch URL in Background*. This keeps DEVONthink in the foreground.
- **Mark:** Changes the flagged, locked, or read status of the selected item.
- **Move Into Database:** Moves an indexed item into the database. Use this command with caution as it moves the file from its current location into the internals of your database. It does not copy the file.
- **Move To External Folder:** Moves a non-indexed item, e.g., imported or created in DEVONthink, out to an indexed folder in the Finder.
- **Move To:** Moves the selected item to the group you select from the submenu.
- **Move to Trash:** Moves the clicked item to the Trash. Hold the ⌥ Option key to shows *Move All Instances to Trash* when used in items lists.

- **New:** This submenu allows you to quickly create several built-in file types. See the [Data menu](#) for more information on these file types.
- **New from Template:** This submenu allows you to create new documents from any of the installed templates.
- **Open:** Opens the selected item in a separate [main window](#) or [document window](#).
- **Open in Tabs:** Hold the ⌥ Option key and *Open* changes to *Open in Tabs*. If the View/Edit pane is visible, this opens the selected items in new tabs. If the View/Edit pane isn't visible, a new document window will open with each selected document in its own tab in the window.
- **Open With:** Opens the selected item in an external application.
- **Rating:** Allows you to set a rating, from no stars to five stars.
- **Replicate To:** Replicates the selected item to the group you select from the submenu.
- **Reveal:** Shows and selects the selected item in its location in DEVONthink.
- **Send by Email:** Sends the selected item by email.
- **Share:** Opens the Share menu.

- **Show in Finder:** Shows the selected item in the Finder.
- **Tags:** This submenu offers special commands for automatically adding some kinds of tags. See the [Tagging > Tagging Sources](#) section of the manual for more information.
- **Thumbnails:** This submenu allows you to *Create*, *Update*, or *Remove* the thumbnail for a file.
- **Ungroup Items:** Ungroups a group, leaving its contents behind. The group is not preserved.

- **Imprinter:** Choose an imprint you've defined in [Settings > Imprinter](#) to apply it to the current image or PDF.
- **OCR:** Choose the output file type and convert a compatible file via OCR.

> Note:
> **Send by Email:** The ability to add the attachments depends on the inter-application capabilities of the email application. If it doesn't provide support for this, you may be able to drag files into draft message or the email application's dock icon.

SEARCH OPERATORS

Searching in DEVONthink already is a powerful function. The addition of Boolean operators, parentheses, and wildcards extend the power to fine-tune your search even further.

> Note: The syntax of the operators is compatible to [DEVONagent](#) and [EasyFind,](#) the Finder, Spotlight, common search engines as well as common programming languages such as C, C++, Objective-C, Java, and JavaScript. The complexity of the query is unlimited.

CASE

All terms are case-insensitive. You may, if you wish, use capitalization for proper names in a query, but DEVONthink will ignore case in interpreting the query.

PRECEDENCE OF TERMS

Search terms and associated operators will be interpreted from left to right, except as modified by including portions of the query within parentheses.

WILDCARDS

To make searching more flexible, you can replace parts of words with wildcards. For example, you can search for plural forms of words without having to type, e.g., "dog" and "dogs". The available wildcards are:

- **?**: Matches exactly one character.
- *****: Matches none, one, or multiple characters.
- **[a-z]**: Matches one character of the range `a` through `z`.
- **[abc...] or [a|b|c|...]**: Matches one character out of the given list of characters.
- **[^...]**: Matches one character that is not contained in the given list or range.

Note: The wildcards presented here are not full regular expressions.

Example: Searching a document containing this text: *DEVONtechnologies makes great software*:

`text:~tech` matches as the *tech* is contained in one of the words.

`text:tech` does not match as there is no word *tech*.

`text:tech*` does not match as there is no word beginning with *tech*.

`text:*tech` does not match as there is no word ending with *tech*.

`text:*tech*` matches as *tech* is found in a word with text before and after it. However, unless you have a specific purpose, using the contains (~) operator is more succinct.

Searching a document with the text: *He made a cake. She is making cookies. They live in Madeira*:

`text: ma[dk]*` matches "made", "making", and "Madeira".

`text: ma[dk]?` matches only "made".

Given a document named *2024-2-14_Big Light Electric*:

`name:[0-9]` would only match "2".

`name:[0-9][0-9]` would only match "14"

`name:[0-9]*` would match all the numbers, regardless of length.

`name:[0-9][0-9]*` would match two or more numbers, e.g, "14" and "2024".

`name:19[0-9][0-9]` If you were looking for documents only in the 1900s, this would match, e.g. "1914".

> `name:202[0-9] big` would match this document or others from the 2020s, e.g., "*2021-3-9_Big* Light Electric".

BOOLEAN OPERATORS

The operators (often called Boolean operators) are words or symbols that establish logical rules for the terms in the search query. If no operator is given, DEVONthink infers AND. The available Boolean operators are:

- **term1 AND term2:** Contains `term1` AND `term2`
- **term1 BUT term2:** Contains `term1` AND `term2`
- **term1 OR term2:** Contains `term1` OR `term2`
- **term1 XOR term2:** Contains `term1` or `term2`, but not both
- **term1 EOR term2:** Contains `term1` or `term2`, but not both
- **NOT term:** Does not contain `term`
- **"term1":** Contains the string of words `term1`, in exactly this form

Besides the classic Boolean operators, DEVONthink uses a number of operators that usually are found in high-end databases. Use these operators as a replacement for AND and "quotes" to fine tune your query.

- **term1 OPT term2:** `term1` is required, `term2` is optional. If `term2` is also found, the found document ranks higher in the search results.
- **term1 NEAR term2:** `term1` occurs 10 words or less before or after `term2`
- **term1 NEAR/n term2:** `term1` occurs n or less words before or after `term2`
- **term1 BEFORE term2:** `term1` occurs before `term2`
- **term1 BEFORE/n term2:** `term1` occurs n or less words before `term2`
- **term1 NEXT term2:** `term1` occurs right before `term2` (shortcut for `BEFORE/1`)
- **term1 NEXT/n term2:** `term1` occurs n or less words before `term2` (synonym for `BEFORE/n`)
- **term1 AFTER term2:** `term1` occurs after `term2`
- **term1 AFTER/n term2:** `term1` occurs n or less words after `term2`
- **~term1:** Contains `term1`, also as part of a word

For convenience, some of these operators can also be abbreviated using commonly used symbols:

- **AND:** `&, &&, +`
- **OR:** `|, ||`
- **XOR:** `^, ^^`
- **NOT:** `!, –`

Operators are evaluated in the following priority: parenthesis > phrase/hyphens > (`NOT`) `BEFORE/AFTER/NEAR/NEXT` > `NOT` > `AND/OR/XOR/EOR`. Terms with same priority but without parenthesis are evaluated from left to right.

WHITE SPACE HANDLING

Words linked by non-white separators (e.g., `page-index` or `page_id`) are treated like phrases put into "quotes". Words separated by hyphens are handled like `word1word2 OR "word1 word2"`. Characters separated by dots are considered to be abbreviations and therefore handled like words separated by hyphens, e.g., the term `t.a.t.u` is equal to `"t a t u" OR tatu`.

EXAMPLES

By using any or all of the operators and rules laid out above you can create complex queries that find the exact information you're looking for. Here are some example queries that show how the operators are used.

> **Example:** `Devonian Dinosaurs`

This query looks for all documents that contain the words "devonian" and "dinosaurs".

> **Example:** `(Steve NEAR Jobs) AND iMac BUT NOT MacBook OPT Pro`

This query looks for documents that contain the words "Steve" and "Jobs" no farther ten words away from each other, as well as the word "iMac" (no specific position relative to Steve and Jobs), but not the word "MacBook". The word "Pro" does not need to occur, but if it does, the document is ranked higher in the list of search results.

> **Example:** `Paracetamol NEAR (~effect OR impact) AND ((side OR second*) NEAR/2 ~effect)`

This query looks for documents containing the word "Paracetamol" near (within 10 words) to words either starting with "effect" (and so also "effects") or "impact". In addition, the document needs to contain the word "side" or any word starting with "second" located within two words range of any word starting with "effect".

SEARCH PREFIXES

DEVONthink supports a wide variety of searchable attributes. These include common attributes, like names or tags, but also include document or DEVONthink-specific items, like word counts or [custom metadata](#) you've defined.

Similar to searching with Spotlight or some other applications, the use of search prefixes is supported. These take the form of a *prefix* and a *prefix operator*, e.g., `name:`, followed by the search term. These prefixes are automatically applied when you choose criteria in an advanced search but they can also be manually entered in the search field.

SEARCH PREFIXES

Below is a list of the available search field prefixes as you would manually type into the search field or a script:

- **text:** Text contents in a file.
- **metadata:** The metadata for a file.
- **name:** The name of an item. For documents, this is distinct from the *filename* and does not include the file extension.
- **url:** The associated URL.
- **comment:** Spotlight Comments.

- **docAuthors:** The name of the sender of an email.
- **docAuthorEmailAddresses:** The email address of the sender of an email.
- **docRecipients:** The name of a recipient of an email.
- **docRecipientEmailAddresses:** The email address of a recipient of an email.
- **docTitle:** The title of a file. The title may be distinct from its name, e.g., a song title for an MP3 file.
- **docComment:** The RTF-specific comments for a file.
- **docHeadline:** A headline applied to some files. Rare.
- **docSubject:** The subject line from an email.
- **docDescription:** The description found on some files, typically images.
- **docKeywords:** The PDF or RTF specific keywords for a file.
- **docOrganization:** The company specified in imported links or vCards from the Contacts application.
- **docCopyright:** Copyright information in the metadata of a file.
- **docAlbum:** The album information from media metadata, e.g., MP3 files.
- **docComposer:** The composer information from media metadata, e.g., MP3 files.

- **docCreator:** The process or application used to create a file.
- **docProducer:** The producer of a file, usually applied to media files.

- **aliases:** Aliases applied to an item.
- **tags:** Tags applied to an item.

- **label:** The color label of an item, from 0 (no label) though 7 or by name, e.g., *Important*.
- **rating:** The star rating of an item, from 0 (unrated) through 5.
- **width:** The width of a document in points, i.e., the width multiplied by 72.
- **height:** The height of a document in points, i.e., the height multiplied by 72.
- **length:** The number of pages in a file or length of a media file in seconds.
- **size:** The size of an item in bytes, KB, MB, or GB, e.g., `size >= 50 MB`.
- **wordcount:** The number of words in the contents of a file.
- **charactercount:** The number of characters in the contents of a file.
- **hits:** The number of times a file has been viewed or opened.
- **filename:** The name of the file in the file system, including the file extension.
- **extension:** The extension of a file, e.g., *txt*. This also supports an *Any Extension* option to filter filenames having or lacking an extension.
- **kind:** Supports `any`, `group`, `smartgroup`, `tag`, `ordinarytag`, `grouptag`, `text`, `rtf`, `formattednote`, `markdown`, `html`, `webarchive`, `xmlfile`, `propertylist`, `image`, `pdf`, `quicktime`, `video`, `audio`, `bookmark`, `feed`, `news`, `script`, `sheet`, `email`, and `other`.

Item prefixes: These special prefixes are for state-based queries, like if items are replicants or contains aliases. They all follow the form of `item:<specified state>`, e.g., `item:locked`.

You can specify the state of items, i.e., *is* or *is not*. The available options are as follows:

- **Replicated:** Matches items that are replicants.
- **Duplicated:** Matches items that are duplicates.
- **Indexed:** Matches items that are indexed, not imported.
- **Pending:** Matches items whose contents aren't downloaded and available.
- **Tagged:** Matches items with tags applied.

The other option is specifying whether items do or don't contain a certain property. For example, you can search for items containing aliases and the `item:<specified state>` syntax is also used. This includes the negated form. Here are the searchable properties:

- **Aliases:** Matches items with aliases.
- **Annotation:** Matches items with an associated annotation file.
- **Comment:** Matches items with a Finder comment.
- **Data:** Matches items with child items, e.g., a group with items contains data. An empty group can be found via `item!:data`, meaning the item does not contain data.
- **Metadata:** Matches items with metadata.
- **Reminder:** Matches items with a reminder set. (See Annotations & Reminders)
- **Script:** Matches items with a script applied in the *Info* inspector.

- **Thumbnail:** Matches items with a thumbnail applied.
- **URL:** Matches items with a URL set in the *Info* inspector.

Marked: Item states shown in the *Flag* column in the item list, e.g., locked, can be searched for. When choosing criteria in the *Advanced* options of the toolbar search, choose the *Marked* criterion. If using a raw query string, the search prefix is `item:<specified state>` and it's negated form, `item!:<specified state>`. Here are the marking options available:

- **Flag:** The flag state of an item. Supports `flagged` or `unflagged`.
- **Unread:** The unread state of an item. Supports `read` or `unread`.
- **Locking:** The locking state of an item. Supports `locked` or `unlocked`.

Dates: Dates are a very commonly used property in searches, for example, if you're looking for a document you created two days ago. Here are the date-based properties you can search for. See the Date Operators in the next section for the syntax you can use with these.

- **added:** The date the item was added to the database. The long form `additionDate` is also supported.
- **created:** The date the item was created. The long form `creationDate` is also supported.
- **modified:** The date the item was last modified. The long form `modificationDate` is also supported.

- **opened:** The date the item was last opened. The long form `openingDate` is also supported.
- **due:** The due date set in a Reminder for an item. The long form `dueDate` is also supported.

Miscellaneous Properties: There are also some a bit more esoteric attributes you can search for, like the number of attachments in emails, or the detected language of a document.

- **md_attachments:** The number of attachments in an email or the number of resources added to an RTFD file.
- **md_annotationcount:** The number of annotations set in a PDF file.
- **md_encrypted:** The encrypted state of a PDF. This is a Boolean value denoted numerically, e.g., `md_encrypted==1` when a file is encrypted.
- **md_incomingItemLinkCount:** The number of item links to a document from other documents in DEVONthink.
- **md_outgoingItemLinkCount:** The number of item links to other documents present in a document.
- **md_language:** An abbreviation of the detected language in the contents of a file. For a list of values, select a language in the criteria and note the abbreviation to use.
- **md_country:** An abbreviation of the country in the geolocation data for a file. For a list of values, select a country in the criteria and note the abbreviation to use.
- **md_zipcode:** The postal code detected in the geolocation data for a file.

- **md_area:** The state, province, or region detected in the geolocation data for a file.
- **md_locality:** The city detected in the geolocation data for a file.

Custom Metadata: Any custom metadata attributes defined in the *Data* settings are also available as search prefixes. The search prefix you will type is a concatenated form of the attribute's name, prefixed with `md`. For example, an attribute of `Total Cost` would have a search prefix of `mdtotalcost.`

There are also two special prefixes you can use:

- **scope:** This limits where you are searching. It supports `selection` (the current group or database), referring to a database by name (in quotes), and `inboxes`. If no scope is specified, the search applies to all open databases. When used, `scope:` should be the last parameter in the query.
- **any:** When used, this allows you to specify whether to return results matching any of the criteria. This can only be used when specifying more than one search prefix, e.g., tags and filename.

Example:
```
additionDate>=2019-03-10
scope:selection
tags:sync; methods scope:"Tech
Stuff"
any: name:test OR imprint {any:
tags:blue; red}
```

Sub-criteria searches: Yes, you may have noticed in the last example a tags search in curly braces. This creates sub-criteria for the

search. This obviously extends the search options to allow creating even more complex forms.

PREFIX OPERATORS

Many times prefixes end with a colon, e.g., `tags:` but some use other forms, depending on the available options in the criterion. For example, words can "begin with" some characters, but a size is greater or less than a value. If you select a criterion you would see what options apply. Use the keys below to map the option to its operator.

Matches, Is, Is Not:

`:` is equal to the term *matches*. With strings-based queries, it allows for wildcards to be used. It is also used for state-based queries, like *Kind*. The negated form, `:!` is also supported.

`==` is equal to the term *is*. This must be an exact match of the search term. These can be used in strings and number-based queries. The negated form, `!=` is also supported.

> **Example:**
> Kind is Group → `kind:group`
> Item is indexed → `item:indexed`
> Item is not Replicated → `item:!`
> `replicated`
> Extension is XML Document →
> `extension==XML`
> Language is not English → `language!=en`

String Matching: These are operators that are used with string-based queries, like names or text content. These queries also support:

`:<` is equal to *begins with*.

`:>` is equal to *ends with*.

`:~` is equal to *contains*. (The tilde is the second key down on the top left of an English keyboard.)

> **Example:**
> Subject begins with party →
> `docSubject:<party`
> Locality ends with field →
> `md_locality:>field`
> Name contains tech → `name:~tech`

Number Matching: In addition to the `==` and `!=` operators, numbers can also use these operators:

`<` is equal to *is less than* and `<=` is *is less than or equal to*.

`>` is equal to *is greater than* and `>=` is *is greater than or equal to*.

> **Example:**
> Word Count is less than 1000 →
> `wordcount<1000`
> Size is greater than 10MB → `size>10 MB`
> Hits is greater than or equal to 1 → `hits>=1`

Range Matches: For certain numerical attributes, you can use a range matching syntax, `attribute:lowerLimit-upperLimit`. For example, `wordcount:500-1000` matches files with between 500 and 1000 words. This is identical to the longer form syntax of `wordcount>=500 wordcount<=1000`. Range matches can be used with: *width*, *height*, *duration*, *length*, *hits*, *wordcount*, *charactercount*, and *size* prefixes.

Date Operators: These are operators used with date-based queries, like the creation date of files.

`<` is equal to *before* and `<=` is *before or on*.

`>` is equal to *later* and `>=` is *later or on*.

`:#` is equal to *within last* and `:!#` is *not within last*. These searches default to days, but you can also use *weeks*, *months*, or *years*. For example, `modified:!#1weeks`, noting you always use the plural form of the time component.

For dates-based queries, `:` is equal to *is* and `:!` equals *is not*.

For greater compatibility, some other combinations of operators are allowed. `due:<=2020-01-03` is equivalent to `due<=2020-01-03`.

Named Relative Dates: You can use these terms for relative dates: *Today*, *Yesterday*, *This Week*, *Last Week*, *This Month*, *Last Month*, *This Quarter*, *Last Quarter*, *This Year*, and *Last Year*. Use these with *is*, *before (or on)*, and *after (or on)* operators.

> **Example:**
> Date Created is after January 31, 2019 →
> `created:>=2019-01-31`
> Date opened is not within last 5 days →
> `openingDate:!#5days`
> Date Due is not Today → `due:!Today`

Date searching allows for some flexibility in formats. Time is not a required parameter, but can be specified. These searches are all equivalent:

> **Example:**
> `additionDate>10 march, 2019`
> `additionDate>March 10, 19`
> `additionDate>2019-03-10 08:30:00`
> `-0500`

TEMPLATES

DEVONthink comes with a number of built-in templates for general use. Use these templates to add a task list, a quote, or whole group structure for project management to your database.

Templates are stored in the `~/Library/Application Support/DEVONthink 3/Templates.noindex` folder. In order to manage your templates, rename them, organize them in subfolders, or delete them, you can quickly access this folder by selecting *Data > New from Template > Open Templates Folders*. More templates are available by selecting *Data > New from Template > More Templates*, or as extras in the Support Assistant or in the Extras sidebar.

A very useful thing you can do is add your own files to this folder, even if the files aren't directly editable in DEVONthink. For example, you may have a specific Pages template you often use. Open the template in Pages and save it into DEVONthink's Templates folder. Now you can add documents to your database even more efficiently.

BUILT-IN TEMPLATES

DEVONthink comes with the following built-in templates, which serve as great examples of the template feature.

Accounts & Passwords:

- **Email Accounts:** Adds a sheet to record technical details of an email account details.
- **Online Account:** Adds a sheet for storing website account details.
- **Serial Number:** Adds a sheet for storing product serial numbers.

Classifications:

- **Decimal Filing System:** Adds ten groups for the decimal filing system used by many European companies for filing (scanned) paper documents.
- **Dewey Decimal Classification:** Inserts a group with sub-groups that builds the first levels of the Dewey Decimal Classification. Use this feature for databases that contain knowledge spanning many subjects.
- **Library of Congress Classification:** Inserts a group with sub-groups that builds the first levels of the Library of Congress Classification. Use this feature for databases that contain knowledge spanning many subjects.

Education:

- **Cornell Notes:** Adds a document that allows you to write notes in Cornell style on a topic of interest. Available as Markdown or rich text documents.
- **Cornell Notes (Education):** Adds a document that allows you to write notes in Cornell style for a particular course and topic. Available as Markdown or rich text documents.
- **Lab Notes:** Adds a document that allows you to create lab reports. Available as Markdown or rich text documents.
- **References:** Adds a sheet for recording citation information such a DOI, authors, journal, publication year, etc.
- **Reference (from Bookends):** Adds the reference selected in Bookends to your database.
- **Reference (from Endnote):** Adds the reference selected in Endnote to your database.
- **Quotes:** Adds a sheet for recording quotes along with the author, source, comments, etc.
- **Quote (from clipboard):** Adds a rich text document for a quotation or citation. The clipboard content is automatically inserted and, if it's an Internet address (URL), it is automatically made clickable.
- **Articles:** Adds a sheet for keeping track of articles.
- **Booklets:** Adds a sheet for keeping track of booklets.
- **Books:** Adds a sheet for keeping track of books.
- **Manuals:** Adds a sheet for keeping track of manuals.
- **Proceedings:** Adds a sheet for keeping track of proceedings.
- **Technical Reports:** Adds a sheet for keeping track of technical reports.
- **Theses:** Adds a sheet for keeping track of theses.
- **PubMed:** Runs a query in PubMed and adds the resulting documents formatted as rich text documents to your database.

Productivity:

- **Daily Journal:** Adds Journal group with month and day subgroups, containing a file with a daily quote, some news headlines, and space to write your thoughts. This template is a good example of smart templates. The journal is available in two separate templates: *Text* (rich text) and *Markdown*.
- **Note:** Adds a new note. If the clipboard contains text, it is automatically inserted.
- **Phone Note:** Adds a new phone note, automatically inserting the current date and time.
- **Project:** Adds a simple project group structure including an "About this project" document. The smart template asks for a project name; retrieves your name, department, email address, and phone number from your contact card; and adds this information to the "About this project" document.
- **Task List:** Adds a simple task list.
- **Weekly Review:** Adds a formatted note displaying checklist items and space to review the week.

Registers:

- **1--31:** Adds 31 groups, numbered 1 through 31.
- **A--Z:** Adds 26 groups, named A through Z.
- **Days of the Week:** Adds groups for the days of the week.
- **Months:** Adds groups for the twelve Christian months.

Smart Groups:

- **Email ... Videos:** Adds smart groups displaying documents of a given kind.
- **Due or Flagged:** Adds a smart group displaying flagged items or items with a due date this week.
- **Last ...:** Adds smart groups displaying documents modified within a given period.
- **Documents with Annotations:** Adds a smart group displaying files with annotations, e.g., highlights.
- **Large Documents:** Add a smart group displaying documents larger than 5 MB.
- **PDF (not searchable):** Add a smart group displaying all PDF documents that don't contain machine-readable text.
- **Star Ratings (1-5):** Add a smart group displaying items with a rating of one or five stars.

Toolbar: By default this contains no templates. Add your own templates to `~/Library/ Application Support/DEVONthink 3/Templates.noindex/Toolbar`. These can be added to the DEVONthink windows using *View > Customize Toolbar*.

METADATA

DEVONthink stores a large number of metadata fields internally when importing documents from the file system, e.g., from PDF, RTF, MP3, EXIF/IPTC, HTML, and email messages as well as from all files that deliver metadata through the Spotlight metadata importer. Here's a partial list of theoretically supported fields:

FILE METADATA

General Metadata:

- Title
- Headline
- Subject
- Creator
- Producer

PDF Metadata:

- Author
- Title
- Subject
- URL
- Keywords

RTF Metadata:

- Author
- Title
- Comment
- Subject
- URL
- Keywords
- Organization
- Copyright

Email Metadata:

- Authors
- Author email addresses
- Recipients
- Recipient email addresses
- Email addresses

Media and Publication Metadata:

- Album
- Composer
- Contributors
- Publishers
- Editors
- Organizations

MultiMarkdown Metadata:

- title
- description
- author
- comment
- subject
- organization
- keywords
- publisher
- email
- copyright
- generator
- dc.title
- dc.creator
- dc.subject
- dc.description
- dc.rights
- dc.contributor
- dc.keywords
- dc.publisher

- og:title
- og:description
- geo.position
- ibcm

CUSTOM METADATA

Another powerful feature of DEVONthink is custom metadata fields. Specified in the Settings > Data, you can define fields that are meaningful to you, your company, your research group, or even your family!

When you create a custom metadata field, you give it a name. DEVONthink uses this name to create an identifier for use in automated processes. This identifier is created automatically and cannot be changed.

Data Types: When you define a custom field, you choose a data type for it. So what's a "data type"? It's simply a kind of a value; like "a" is a character and "42" is a (the!) number. The following data types are supported, including any interface items associated with them, e.g., checkboxes or dropdown menus:

- **Boolean:** This is a true or false value. Displayed as a checkbox.
- **Countries:** A dropdown menu providing a list of country names.
- **Languages:** A dropdown menu providing a list of languages.
- **Integer:** A whole number, e.g., with no fractional part, like 17.
- **Decimal Number:** A fractional number, represented with a decimal point.
- **Date:** Can be specified as *Date & Time* or *Date*.

- **Identifier:** Any alphanumeric value, specified as needed, e.g., a customer or patient number.
- **Single-line Text:** A dropdown providing a list of terms you defined for the field in the Data preferences. You can also type in a new value.
- **Multi-line Text:** Enter a small paragraph of text. Line breaks can be typed by pressing Option-Return.
- **Rich Text:** Same as Multi-line text but supports basic formatting, e.g., bold or italic text.
- **Set:** Similar to the *Single-line text*, this shows a dropdown with values pre-defined for the field in the Data preferences. However, new values can't be entered outside the preferences.
- **URL:** Accepts any valid URL, including filesystem URLs.
- **Link:** A special dropdown that allows you to choose an item in your databases. a link for the chosen item is used.

> Note: The *Countries* and *Languages* lists are lengthy, but not necessarily exhaustive. For *Multi-line Text* and *Rich Text*, only one line will be displayed in its column in the item list.

Predefined Custom Metadata: In Settings > Data, we have provided some custom metadata fields to get you started. These are ready to use and explore and serve as great examples of the data types discussed above:

- Date
- Company
- Author
- Abstract
- Status

- Serial Number
- ISSN/ISBN
- Digital Object Identifier (DOI)
- PubMed ID
- PMC ID
- Barcode
- Format
- Category
- Subcategory
- Genre
- Country
- Language
- Price
- Tax
- Tip
- Decimal

PLACEHOLDERS

One of the most powerful features of DEVONthink is the ability to insert data dynamically. A placeholder is a bit of code DEVONthink interprets when used in these scenarios, replacing it with a specific value. You may have an imprint with a *Name* placeholder defined in the title. When the imprint is used on a PDF, the placeholder is converted to the name of the file!

To extend the possibilities even further, you can combine static text and multiple placeholders to achieve truly custom results. You can use these in smart rules and the command *Tools > Batch Process*, in alarms on Reminders, custom imprints on images and PDFs, and in templates for creating WikiLinks documents. However, please be aware not all placeholders can be used in all those situations. For example, you can't use

the Location placeholder in a template as the document doesn't have a location until after it's created. Testing is strongly encouraged.

Below is a list of placeholders currently available. Following each description is the raw placeholder that can be used when creating templates in external application or using the `import template` AppleScript command:

- **Name:** The name or title of the document. `%recordName%`
- **Proposed Name:** A suggested name derived from a document's title or from the first line of the document if no title is present. `%recordProposedName%`
- **Name Without Date:** Returns the filename after parsing out any detected dates. `%recordNameWithoutDate%`
- **Aliases:** Any aliases applied to the document. `%recordAliases%`
- **Finder Comment:** Any Finder comments applied to the document. `%recordComment%`
- **File Name:** The filename in the file system. `%recordFilename%`
- **File Extension:** The extension of the document's filename. `%recordPathExtension%`
- **Kind:** The kind of the file, e.g., *group* or *rich text document*. `%recordKind%`
- **URL:** The URL in the Info pane. `%recordURL%`
- **Item Link:** The unique URL of the document. `%recordLink%`
- **Location:** The location in the database; e.g., */Inbox/Research*. `%recordLocation%`

- **Tags:** Tags applied to the document. `%recordTags%`
- **#Tags:** Tags applied to the document but returned as hashtags. `%recordHashTags%`

- **Index:** This is a number that increments based on the number of items being processed by a smart rule. `%recordIndex%`
- **Counter:** Similar to the *Index*, this is a zero-padded incrementing number. `%recordCounter%`
- **Document Amount:** This is an amount detected in the name or content of documents, like receipts or invoices. Often used with [smart rules]. `%documentAmount%`
- **Document String:** This is a string detected in the name or content of documents. Typically used with [smart rules]. `%documentString%`
- **Digital Object Identifier:** The unique digital object identifier of the active document, if available. `%digitalObjectIdentifier%`
- **Bates Number:** Inserts a [Bates number]. `%recordBatesNumber%`
- **Page Count:** The total number of pages in the document. `%recordPageCount%`

- **Group Name:** The name of the group containing the document, e.g., `/001/a/b/myfile.txt` would report *b* as the group name. `%groupName%`
- **Top Group Name:** The name of the top level group in the root of the database, e.g., `/001/a/b/myfile.txt` would report *001* as the top group name. `%topGroupName%`
- **Database Name:** The name of the database containing the document. `%databaseName%`
- **Database Path:** The filesystem path of the database. `%databasePath%`

- **Attachments:** The number of attachments in a document, e.g., a rich text document or email. `%record_attachments%`
- **PDF Annotations:** The number of annotations in the active document. `%record_annotationcount%`
- **Incoming Item Links:** The number of documents containing item links to the active document. `%record_incomingItemLinkCount%`
- **Outgoing Item Links:** The number of documents linked to in the active document. `%record_outgoingItemLinkCount%`
- **Language:** An abbreviation of language detected in the document's indexed contents. `%record_language%`
- **Country:** The country in the geolocation data for a document. `%record_country%`
- **Postal Code:** The postal code derived from the geolocation data for a document. `%record_zipcode%`
- **Administrative Area:** This is state, province, or region in the geolocation data for a document. `%record_area%`
- **Locality:** The city in the geolocation data for a document. `%record_locality%`

- **Tab:** A tab character. `%tab%`
- **Line Break:** A line break (return) character for multi-line text. `%newline%`

Date Placeholders: There are several types of date-specific placeholders to choose from. You can choose from several built-in formats, e.g., the short date, or create your own with individual date component placeholders. Due to the repetition of date placeholders, the raw value of every individual placeholder isn't listed here. However, below are the date component raw values. Note some formats

will resolved relative to your geographic location, e.g., `Jan 1, 2001` for the medium date would be common in the US.

- **01/01/2001:** The short date format. `%shortDate%`
- **Jan 1, 2001:** The medium date format. `%date%`.
- **2001/01/01:** The ISO date format. `%sortableDate%`
- **Saturday, Jan 1, 2001:** The long date format. `%longDate%`
- **11:59:59 AM:** The current time shown in 12 or 24 hour format, depending on your system settings. `%time%`
- **12 hours, 43 minutes, and 12 seconds:** A custom time format made with text and the following placeholders. `%hour%`, `%minute%`, and `%second%`
- **01:** The zero-padded number of the date. `%day%`
- **Saturday:** The name of the day. `%weekday%`
- **01:** The zero-padded number of the month. `%month%`
- **January:** The name of the month. `%monthname%`
- **2001:** The full year. `%year%`
- **01:** The short year. `%shortYear%`

Listed below are the supported date types with their raw value provided. Prefix the raw value with a date component as shown in the example below.

> **Example:**
> %newestDocumentDateLongDate%

- **Current Date:** Today's date. There is no prefix to the raw placeholders for current date.
- **Addition Date:** The date the item added to the database. `recordAddition…`

- **Creation Date:** The date the item was created. `recordCreation…`
- **Modification Date:** The date the items was last modified. `recordModification…`
- **Document Date:** This is a date detected in the document's contents, e.g., in a receipt. For PDFs only the first four pages are used. `documentDate…`
- **Newest/Oldest Document Date:** The newest or oldest date detected in the document. For PDFs, only the first four pages are used. `newestDocumentDate…` and `oldestDocumentDate…`

> Note: When using the raw values for the date types, e.g., modification date, note the date component's raw value will start with a capital letter. For example, use `%recordCreationShortDate%` not "%recordCreationshortdate%".

- **Clipboard:** Inserts plain text content from the clipboard. `%clipboard%`
- **Clipboard Styled:** Inserts rich text content from the clipboard. `%styledClipboard%`
- **Clipboard Link:** Inserts a link from rich text content on the clipboard. `%clipboardLink%`
- **Predefined Author:** This is the *Author* specified in DEVONthink's [Settings > Editing](). `%author%`
- **Username:** The shortname of the current macOS account. `%username%`
- **Full Username:** The longname of the current macOS account. `%fullUsername%`
- **Organization:** This is the company name, if defined by the (Me) contact card in macOS Contacts. `%organization%`

- **Email Address:** The primary email address, as defined by the (Me) contact card in macOS Contacts. `%emailAddress%`
- **Host:** The hostname of the machine. `%host%`

Properties: Some files have specific properties, e.g., the author of an email. These are displayed in the _Info > Properties_ inspector. Here are properties with supported placeholders with their raw value.

- **Author:** The name of the sender of an email. `%kMDItemAuthors%`
- **From:** The email address of the sender of an email. `%kMDItemAuthorEmailAddresses%`
- **Recipient:** The name of a recipient of an email. `%kMDItemRecipients%`
- **To:** The email address of a recipient of an email. `%kMDItemRecipientEmailAddresses%`
- **E-mail:** Email addresses detected in a document. `%kMDItemEmailAddresses%`
- **Title:** The title of a file. The title may be distinct from its name, e.g., a song title for an MP3 file. `%kMDItemTitle%`
- **Comment:** The RTF-specific comments for a file. `%kMDItemComment%`
- **Headline:** A headline applied to some files. Rare. `%kMDItemHeadline%`
- **Subject:** The subject line from an email. `%kMDItemSubject%`
- **Description:** The description found on some files, typically images. `%kMDItemDescription%`
- **Keywords:** Keywords typically applied to PDF, rich text, or images. `%kMDItemKeywords%`

- **Organization:** The company specified in imported links or vCards from the Contacts application. `%kMDItemOrganizations%`
- **Copyright:** Copyright information in the metadata of a file. `%kMDItemCopyright%`
- **Album:** The album information from media metadata, e.g., MP3 files. `%kMDItemAlbum%`
- **Composer:** The composer information from media metadata, e.g., MP3 files. `%kMDItemComposer%`
- **Creator:** The process or application used to create a file. `%kMDItemCreator%`
- **Producer:** The producer of a file, usually applied to media files. `%kMDItemProducer%`

A more extensive listing other types of metadata can be found in the Metadata section of this appendix.

Custom Metadata: This menu lists any custom metadata attributes you've defined in the _Data_ settings. In order to use raw placeholders, add the `md` prefix to the identifier of the custom attribute shown in the settings. For example, `mddoi` for the Digital Object Identifier attribute.

SMART RULE EVENTS AND ACTIONS

Smart rules in DEVONthink provide many powerful actions and events that can trigger these actions. Below is a list of the available options for both.

EVENTS

When an action is triggered is almost as important as the action itself. Actions can be triggered when any of these events occur:

- **On Demand:** Run only when *Apply Rule* is selected in a context menu or [Tools > Apply Rules](#).
- **On Startup:** Runs when DEVONthink launches.
- **Before Synchronization:** Runs all actions before DEVONthink begins synchronizing to any sync location.
- **After Synchronization:** Runs all actions after DEVONthink completes synchronizing to any sync location, i.e. all uploads, downloads, and changes are committed.
- **On Quit:** Runs when DEVONthink quits.

- **Every Minute:** Runs the specified actions every minute.
- **Hourly/Daily/Weekly:** Runs the specified actions on an hourly, daily, or weekly schedule.
- **On Workdays:** Runs on Monday through Fridays.
- **On Weekends:** Runs on Saturday or Sunday.

- **On Creation:** Runs when a new document is created in the specified location. To trigger actions when taking notes or screen captures with the *Sorter*, choose *Via Sorter*.
- **Before Saving:** Runs before saving a matched document.
- **After Saving:** Runs after saving a matched document.
- **On Imprinting:** Runs when any matched document has been imprinted.

- **On Import:** Runs when documents are added to the specified location.
- **On Clipping:** Runs when documents are added via clipping, e.g., via menu commands, the *Sorter*, [DEVONagent](#), bookmarklets, or AppleScript.

- **On Download:** Runs when items are downloaded via DEVONthink's *[Download Manager](#)*.
- **On Scan:** Runs after a scanning operation has completed.
- **On OCR:** Runs after an OCR operation has completed.
- **On News:** Runs when an RSS feed refreshes and receives new articles.

- **On Upload:** Runs when an item is uploaded through DEVONthink's web server.

- **On Open:** Runs when a matching item is opened in a new document window or viewed in a main window.
- **On Open Externally:** Runs when a matching file is opened in an external application.
- **On Launch URL:** Runs when the URL associated with the item is launched.
- **On Reminder:** Runs when an alarm set on a matching item's Reminder comes due.

- **On Renaming:** Runs after matched items are manually renamed.
- **On Labelling:** Runs when a label is added to or changed on an item.
- **On Flagging:** Runs when an item is flagged.
- **On Moving:** Runs when matched items are moved to the specified location.
- **On Classifying:** Runs when matching items are classified by DEVONthink.
- **On Tagging:** Runs when matched items are tagged
- **On Replicating:** Runs when matched items are replicated.
- **On Duplicating:** Runs when matched items are duplicated.
- **On Convert:** Runs when an item is converted to a new format.

- **On Moving into Database:** Runs when indexed items are moved into the database, becoming imported items.
- **On Moving to External Folder:** Runs when imported or created items in a database are moved to external locations, becoming indexed items.

You can and and remove multiple event triggers by pressing the + or - buttons. Fox example, you could use an *On Import* and an *On Moving* event trigger to act on files imported or moved into it.

ACTIONS

The power in smart rules and batch processing is in the actions. DEVONthink provides actions that cover simple tasks, e.g., prefixing a filename, all the way to ultra-powerful AppleScript injection via external or embedded scripts. Since you can chain multiple actions together, the possibilities are nearly endless.

Note batch processing supports a smaller number of actions than smart rules. Here's a list of available actions with those also usable in batch processing marked with *(BP)*:

- **Bounce Dock Icon:** Causes DEVONthink's dock icon to bounce. This will only trigger when DEVONthink isn't the active application.
- **Display Notification:** Shows a message via the Mac's Notification Center. Notifications need to be enabled in *System Settings > Notifications* for *Display Notification* to operate correctly.
- **Display Alert:** Shows a message in an alert window.

- **Speak Text:** Using your computer's voice synthesis, it will speak the message you specify.
- **Play Sound:** Plays a selected system alert sound.

- **Send Mail:** Enter email addresses to send the matching items. This can be a comma-delimited list of addresses, names, or enter the name of a group you've defined in your contacts.
- **Add to Reading List:** Add the matched items to the Reading List.

- **Open:** Opens in a document window, a file that triggered or was produced by a smart rule.
- **Open Externally:** Open the matched file in the system default application.
- **Launch URL:** Open the URL associated shown in the *Info Inspector & URL*.
- **Check Bookmarks:** Checks the URL of the matched items. Any issues with the URL are reported in the *Log window* or the *Log popover*.
- **Apply Rule:** Perform the actions of another smart rule on items passed by the current smart rule. The items passed by the initial smart rule must match the criteria of the second smart rule to trigger it. This can be useful after performing smart rule actions like OCR or executing scripts, helping to avoid redundant or scheduled smart rules.
- **Apply Script:** Run a script on the matched items. Choose a script from installed *External* scripts. Or choose *AppleScript/JavaScript* and write your code in the embedded script editor popup. Embedded scripts are only available to the smart rule they are created in. See also p. 212ff *(BP)*

Item scanning: Supported both in smart rules and batch processing, the next two actions allow you to scan the name or text of a document and use the results when found. Each of the actions also has a parameter you specify for the type of data you're scanning for. These actions and parameters can be used with subsequent actions that support placeholders, e.g., `Scan Text: Date →` `Document Date` with `Change Modification` `Date`. If the action returns no results, actions using the results will not be executed. However, unrelated actions in the smart rule chain will be executed normally.

- **Scan Name:** Scans the name of the file. *(BP)*
- **Scan Text:** Scans the contents of the file. *(BP)*

The following four parameters are used with the *Scan Name* and *Scan Text* actions. With *String*, *Date*, and *Amount*, a prefix and/or suffix before/after the wildcard has to be specified.

- **String:** An asterisk (*) wildcard specifies data to be captured. Other terms added will be used to help located the desired string. In subsequent actions, use the *Document String* placeholder to represent the captured string.
- **Date:** Similar to *String* parameter, use the desired format of the *Document Date* placeholder to represent the captured string in subsequent actions.
- **Amount:** Similar to *String* parameter, use the desired format of the *Document*

Amount placeholder to represent the captured string in subsequent actions.

- **Regular Expression:** Items in parentheses are captured; items outside parentheses are ignored. You can specify multiple captures in an expression. Using the captured text in subsequent actions is specified by using backslash, \, and the number of the capture, starting at 1. Note we use Apple's NSRegularExpression which supports the ICU regular expression syntax.

> **Example:**
> Using the *String* parameter, `Invoice *` would capture `0012345` in a file named *Invoice 0012345.*.
> Using the *Date* parameter, `*` would capture the date in a file named *2020-01-01*.
> Using the *Amount* parameter, `$*` would capture the dollar amount detected.
> Using the *Regular Expression* parameter, `Bill To: ([A-Za-z0-9 ,]+)` would capture the name of the person or company billed. `\1` would be used in the subsequent action.

- **Change Name/Aliases/Comment/Label/ Rating:** Change the specific attribute of the matched file. For items with an existing attribute, e.g., a comment, a placeholder will preserve the existing value. *(BP)*
- **Mark:** Toggle the state of read/unread, flagged/unflagged, and locked/unlocked. Note you change more than one of these attributes with one action, but you can chain more than one *Mark* action in the smart rule. *(BP)*
- **Change Creation/Modification Date:** Change the creation or modification date of matched files to: current, addition,

creation, modification, or the document date. *(BP)*

- **Add Tags:** Add tags to the matched files. As you type, tags from all open databases will be suggested. Press the *comma* key to commit the tag. *(BP)*
- **Add Tags from Document:** Adds existing tags if they are detected in the matched document's contents. *(BP)*
- **Remove Tags:** Removes specific tags you enter. *(BP)*
- **Remove All Tags:** Removes all tags from the items. *(BP)*
- **Tags:** Adds or converts tags to matched documents from these commands: *Convert HashTags*, *Convert Keywords*, *Convert Properties*, *Convert Geolocation*, *Add Vision Suggestions to Images*, and *Scan Barcodes*. (See the
View menu for more information on these options.)

- **Move/Replicate/Duplicate:** Move, replicate, or duplicate a matched file to a chosen location.
- **Duplicate & Continue:** Duplicates matched files and applies subsequent actions to the copies.

- **File:** Allows you to file items into a group. Specify subgroups using a forward slash, e.g., `2019/DEVONtech` would create or file into the DEVONtech subgroup of a 2019 group in the current group. You can use placeholders to define the location. *(BP)*
- **Classify:** Using our AI, this will attempt to move any matched files to an apropos location. Failures to classify files are noted in the Log window.

- **Move Into Database:** Moves indexed items into the database, essentially importing

them. Note this removes the file from the original location in the filesystem.

- **Move To External Folder:** For an item located in an indexed group, this moves the file to the indexed folder in the Finder.

- **Convert:** Attempts to convert files into plain/rich text, formatted notes, Markdown, HTML, web archive, or PDF.
- **Convert & Continue:** Converts files and applies subsequent actions to the copies.
- **Thumbnails:** Adds, updates, or removes a matched file's thumbnail.

- **OCR:** This will perform OCR on a file, if possible. Choose a format to generate a new file in the selected file type. Note the file type selected will override the option set in Settings > OCR > Convert incoming scans to. Choose *Apply* to convert a matched file directly to a PDF with OCR. This action does not generate new files.
- **Imprint:** Apply the selected imprint to any matching files, if possible.
- **Custom Metadata:** If you have specified custom metadata fields, you will have options to change values with an action. For example, if you had a Boolean field named "Done", you could have the action set this field to true when the action is triggered. *(BP)*

- **Move to Trash:** Move the item to the database's trash. The items are not removed from the database until the trash is emptied.
- **Delete:** Be very cautious with this option. Delete truly deletes a file. It is not sent to the database's trash. It is not sent to the Finder's trash. It is completely deleted.

SCRIPTS

Below is a list of the DEVONthink supplied scripts, segregated by the menu items in the *Script* menu:

Comments:

- **Append Selected Text:** Adds the selected text to the comments of the current document.
- **Assemble:** Collects the comments of the selected documents and creates a new document listing them.
- **Convert to Tags:** Converts the tag contained in the comments field to real tags if the comments field of the selected document contains tags separated by commas.
- **Speak:** Speaks the comments of the selected documents.

Data:

- **Move Duplicates to Trash:** Moves all duplicates of the selected document to the trash.
- **Find & Remove Similar Contents:** Finds and removes similar documents.
- **Group With Duplicates:** Creates a group with duplicates of the selected documents.
- **Group With Replicants:** Creates a group with replicants of the selected documents.
- **Verify & Optimize Databases:** Runs a verification on all open databases and optimizes them if they verify successfully. Errors are alerted and logged to *Window > Log*.
- **Check file integrity of databases:** Runs a checksum comparison on all items in open databases to check for any discrepancies in the current and stored values. Errors are alerted and logged to *Window > Log*.

Download:

- **Linked Images of Page:** Adds linked images of a displayed web page to the database.
- **Images of Page:** Adds the images of a displayed web page to the database.
- **Links of Page:** Adds links contained on a displayed web page to the database.
- **Download as...:** Converts bookmarks to one of these formats: *Formatted Notes*, *HTML Pages*, *PDF Documents* (One Page or Paginated), and *Web Archives*

Edit:

- **Count Characters:** Counts the characters in the current selection.
- **Count Words:** Counts the words in the current selection.
- **Replace text in documents:** Enter text to find and replace in plain and rich text documents.

Execute:

- **AppleScript:** Executes an AppleScript script.
- **Perl:** Executes a Perl script.
- **Shell:** Executes a shell script.

Export:

- **Listing:** Saves a UTF-8 text file containing a text listing of the names of all contents/groups of the current database.
- **Daily Backup Archive:** Creates a compressed backup (.Zip) of the current database in `~/Backup`. All backups are include a datestamp in the filename for easy tracking and identification. These can be useful for copying to external

media or uploading to a cloud service as a secondary backup strategy. Note: When using this script with an encrypted database, the database will be compressed in an unencrypted state.

Feeds:

- **Nature -- Hubble News:** Downloads the latest Hubble news.
- **iTMS -- Added Albums:** Downloads covers of albums recently added to the iTunes Music Store.

Format:

- **Body Normal:** Formats selected text as "Body Normal".
- **Body Small:** Formats selected text as "Body Small".
- **Header Capitalized:** Formats selected text as "Header Capitalized".
- **Header Main:** Formats selected text as "Header Main".
- **Header Secondary:** Formats selected text as "Header Secondary".
- **Source:** Formats selected text as "Source".
- **Reset Spacing:** Resets the line and paragraph spacing of selected rich text.

Images:

- **Copy Info to Comment:** Copies basic image info to the comment field.
- **Flip Horizontal / Vertical:** Flips the image horizontally/vertically.
- **Rotate Left / Right:** Rotates the image left/right.
- **Landscape to Portrait:** Rotates only landscape images to portrait.
- **Portrait to Landscape:** Rotates only portrait images to landscape.

- **Scale to 1024 pixels:** Scales the image to 1,024 pixels.
- **Scale to 200%:** Scales the image to 200 percent.
- **Scale to 50%:** Scales the image to 50 percent.

Import:

- **Del.icio.us:** Imports your del.icio.us bookmarks. The descriptions are used to name the imported bookmarks; the notes and the tags are added to the comments. If the keychain does not contain a key for del.icio.us, dialogs pop up allowing you to enter the user name and password.
- **Man Page:** Imports a UNIX manual page as a PDF document.
- **Perldoc:** Imports the documentation of Perl pages, modules, functions, or programs.

Reminders:

- **Add as Event to Calendar:** Adds a new event to Calendar linking back to the selected item in DEVONthink.
- **Add as To Do to OmniFocus:** Adds the selected item as a to-do item to OmniFocus.
- **Add as To Do to Reminders:** Adds the selected item as a to-do item to Reminders.
- **Add as To Do to The Hit List:** Adds the selected item as a to-do item to The Hit List.
- **Add as To Do to Things:** Adds the selected item as a to-do item to Things.

Note: These are scripts for integrating with external applications. For scripting internal reminder scripts, see the Reminder Scripts section of the chapter about automation.

Rename:

- **Append Selected Text:** Appends the selected text to the title of the currently selected item.
- **Replace Text:** Replaces a text passage in the titles of selected documents.
- **To Webpage Title:** Sets the titles of the selected documents to the names of the web pages pointed to by their URL fields.
- **To Subject:** Sets the titles of the selected documents to the subject lines of the email messages if the selected documents are email messages.

Sheets:

- **Add Multiple Records:** Adds up to 999 empty records to a sheet.
- **Column Sum&Mean Value:** Calculates the sum and average of a table column.
- **Row Sum&Mean Value:** Calculates the sum and average of a table row.
- **Check sums in last column:** Checks the sums in the last column on validity.

Tabs:

- **Open Bing:** Open a new tab for the Bing search engine.
- **Open Google:** Open a new tab for the Google search engine.
- **Open Location:** Open a new tab for a location you specify.

Note: The last script does no URL validation, though DEVONthink's dictionary makes it possible to script this too.

Thumbnails:

- **Flip Horizontal / Vertical:** Flips the thumbnails of selected documents horizontally/vertically.
- **Rotate Left / Right:** Rotates the thumbnails of selected documents left/right.
- **Landscape to Portrait:** Rotates only landscape thumbnails to portrait.
- **Portrait to Landscape:** Rotates only portrait thumbnails to landscape.

Note: While these scripts work with all image formats including PDF, they should not be used for PDF documents. They will only work on the first page of the PDF and destroy all embedded metadata.

Caching: All scripts in the *Scripts* menu are cached, meaning their properties are persistent until you quit and relaunch the application or DEVONthink automatically updates the menu, e.g., after adding or removing scripts.

WEB SITE EXPORT TEMPLATES

For exporting selected groups or files as a web site, DEVONthink uses templates available in `~/Library/Application Support/DEVONthink 3/Websites/` to create HTML files from documents. You can choose the template in the save dialog that appears when you use *File > Export > as Website.*

In the markup of HTML templates, the following placeholders can be used:

- %charset%
- %comment%

- %content%
- %databasePlusLocation%
- %modification%
- %stylesheet%
- %title%
- %url%
- %tags%

These placeholders will be replaced with actual information during the export. The placeholders will only be replaced in documents that are converted to HTML during export, namely plain text, rich text, Microsoft Office/OpenOffice documents, scripts, chat logs, and sheets.

HIDDEN PREFERENCES

There are a few settings in DEVONthink not available through the application *Settings*. Most of them are intended to facilitate customer support but they might be interesting for you as well.

HOW TO ACCESS THE HIDDEN PREFERENCES

All hidden preferences are simple on/off switches. You set and unset them using the "defaults" command in the Terminal. To set preferences via the Terminal DEVONthink must not be running or it will overwrite your changes when you close it.

To set a preference using the Terminal, noting the commands are case-senstive, they are written like this:

Terminal:

```
$ defaults write com.devon-
technologies.think3
ShouldScaleAttachedImages -bool TRUE
```

The above command activates the preference with the key "ShouldScaleAttachedImages". Change TRUE to FALSE to deactivate it. Use any of the preferences keys below to activate or deactivate them.

Some hidden preferences allow specifying a numeric value, e.g., *CounterDigits*. These types of preferences also need to be set via a Terminal command. Use the `-int` argument before specifying the number, like so:

Terminal:

```
$ defaults write com.devon-
technologies.think3 CounterDigits -int 3
```

There is a special preference to allow DEVONthink to detect other plain text formats as plain text: "AdditionalPlainTextExtensions". As it replaces the list of additional plain text extensions we recommend that you read the current list first (empty by default) before adding your own to the end of the list.

Terminal:

```
$ defaults read com.devon-
technologies.think3
AdditionalPlainTextExtensions

2014-07-31 08:25:27.101
defaults[21950:3312262] The domain/
default pair of (/Users/eb/Library/
Preferences/com.devon-technologies.think3
AdditionalPlainTextExtensions) does not
exist

# This "error" shows there are no
additional formats specified.

$ defaults write com.devon-
technologies.think3
AdditionalPlainTextExtensions -
string .otl.todotxt
```

```
$ defaults read com.devon-
technologies.think3
AdditionalPlainTextExtensions

.otl.todotxt
```

AVAILABLE HIDDEN PREFERENCES KEYS

- **AdditionalPlainTextExtensions:** Adds additional plain text extensions, separated by dots.
- **AVSkippingInterval:** Specify the numbers of seconds to skip forward or backward when using the right and left arrow keys with *Shift* held in audio/video files. Seconds are specified as an `-int`, e.g., `-int 5`. The default is 15 seconds.
- **AdditionalXMLExtensions:** Adds additional XML file name extensions, separated by dots.
- **BatesNumberDigits:** Specifies the number of digits used for the placeholder.
- **CounterDigits:** Specifies the number of digits used for the placeholder.
- **DatePlaceholdersWithoutLeadingZeros:** Disables date and time placeholders from using prefixing zeros.
- **DisableActivityWindow:** Disables automatically showing/hiding of the *Activity* window.
- **DisableAutomaticDeconsolidation:** Inhibits items added to indexed groups in DEVONthink from automatically moving out to the indexed Finder folder.
- **DisableAutomaticUpdatingOfIndexedItems:** Disables automatic updating of indexed items.
- **DisableBadgeLabel:** Disable the badge label on DEVONthink's Dock icon.
- **DisableFileSystemEvents:** DEVONthink no longer listens to file system events.

- **DisableFileCoordination:** DEVONthink no longer uses file coordination, registering its interest in certain files and waiting for replies. This can cause very long delays if the coordinating process isn't responding quickly.
- **DisableFinderTags:** DEVONthink no longer imports or exports Finder tags.
- **DisplayGroupsInPreviewPane:** DEVONthink will display the contents of selected groups, smart groups, and feeds in the view/edit pane of main windows. The preview only displays files, not groups.
- **DisableHighlightColorMapping:** Uses the same colors when highlighting documents in dark and light mode.
- **DisablePDFValidation:** Disables validating PDFs created by merging, converting, or clipping.
- **DisablePreprocessedClipping:** Disable additional processing of a web page's content before sending the clipped file to DEVONthink.
- **DisableRelativeDates:** Disable displaying relative dates, e.g., "Today" in the item list. This will instead always show absolute dates, e.g., "2023.02.14".
- **DisableTagAutocompletion:** Disable displaying the popup of tag suggestions when entering tags, e.g., in the Tags bar.
- **DontAutomaticallyEnableOperatorsOptions:** After a toolbar search, disables automatically enabling the *Operators & Wildcards* option in the *Search* inspector.
- **DontSetFindPboard:** Disable using macOS' shared pasteboard, avoiding search terms from being automatically used in other applications.
- **EnableApplicationFiles:** Applications can be imported/indexed.

- **EnableAutomaticConsolidation:** Indexed items moved to a non-indexed location in the database will be moved from their Finder location as an imported item.
- **EnableFSEventLogging:** Enables logging of filesystem events when requested by our support team. It should not be needed for general use.
- **EnableEvernoteRTFDImport:** Enable this to import notes from Evernote notebooks as rich text files.
- **EnableSearchFieldAutocompletion:** Enable this to have DEVONthink attempt to complete search strings as you type them in the toolbar search field. Note this option only works when the search options *Live while typing* and *Partial matches while typing* are disabled. (See also p. 87ff)
- **ForceEditablePDFs:** Some PDFs contain objects that are problematic for Apple's PDFKit. DEVONthink opens these files in a read-only state. Enable this option to disable this behavior and open all PDFs as editable. Note: This does not eliminate the potential for problems with certain PDFs.
- **IndexRawMarkdownSource:** Index the source code of Markdown files instead of the rendered content only.
- **MaximumNumberOfRecentDestinations:** Specify the number of recent destinations shown in the *Recent Destinations* section of the context and popup menus, e.g., in the Move To popover. The default value is 10.
- **MaximumNumberOfRecentSearches:** Specify the number of recent searches available in the toolbar search field or the Search inspector. The default value is 10.

- **MonospacedSidebarFont:** Use a monospaced system font in the sidebars of main windows.
- **MonospacedViewFont:** Use a monospaced system font in the item list of main windows.
- **OpenLinksInForeground:** Clicked links always open in the foreground, including when opening documents externally. In Terminal: `-bool FALSE`
- **PersistentSortingOfSearchResults:** Retains the last sort method used in database search results.
- **PlainTextIsMarkdown:** Treat all plain text files as markdown.
- **RawMarkdownPasting:** When pasting rich content into a Markdown file, the formatting is converted to Markdown. Enable this to ignore formatting and paste as raw plain text.
- **RawOPMLImport:** Imports `.opml` files as native files instead of parsing and creating groups, feeds, etc. from them.
- **RichNotesWithoutAttachments:** Services create RTF instead of RTFD.
- **ShowAdditionalInfoInPathBar:** Shows some details about the selected item in the *Information Bar*.
- **SyncDebugLog:** Enable additional sync logging for debugging.
- **UsePDFDocumentDates:** Use the PDF's internal metadata dates instead of the filesystem dates when importing and setting creation and modification dates.
- **WindowToolbarStyleExpanded:** Enable the expanded toolbar style on macOS Big Sur. This shows the title bar above the toolbar instead of the new unified default style.
- **WindowToolbarTitleHidden:** Permanently removes the title of a main window,

making space for more toolbar buttons. Note this cannot be used if *WindowToolbarStyleExpanded* is enabled.

- **ServerDebugLog:** Enable additional logging for debugging DEVONthink's webserver.
- **WebServerSession:** Specify the duration of idle time before logout in DEVONthink's websharing interface. The duration is specified in seconds as an `-int`, e.g., `-int 600`. The default duration is 1800 (30 minutes).

Note: These hidden preferences could be changed or removed with any update.

READ ME

This chapter contains the version history of DEVONthink, our end user license agreement (EULA), and credits.

VERSION HISTORY

➕ New   ⤴ Improved   ✔ Fixed   ➖ Removed

VERSION 3.9.17

After a crash, DEVONthink no longer shows a warning but only shows an alert when you open a database that's already in use on the same computer. Creating a new sheet lets you name the sheet right away. We also improved the appearance when using or toggling to dark mode and back. Bonjour syncing ignores dynamically changing host names for more reliable connections. And, as always, we fixed various issues, too, from Markdown rendering to converting document formats.

➕ The *Data > New > Sheet* panel lets you name the new sheet.

➕ A new warning shows when a database may be open in another user account.

➕ A hidden preference, `WindowToolbarTitleHidden`, lets you hide a main window's title and gives you more space for toolbar items. Note that you cannot use it with the `WindowToolbarStyleExpanded` hidden preference.

⤴ The *Format Bar* is available in fullscreen window mode on macOS 15 and later. Show or hide it with *Format > Show/Hide Format Bar*.

⤴ The *Table of Contents* inspector is more compatible with poorly constructed HTML content.

⤴ You can make the group selector larger.

⤴ DEVONthink positions Popovers more consistently relative to the current window.

⤴ DEVONthink no longer shows a warning dialog after it crashed or was quit forcefully.

⤴ DEVONthink better supports the System Settings' *Accessibility > Display > Increase contrast* option, especially in dark mode.

⤴ File and folder names can have leading or trailing underscores in their names.

⤴ Automation prompts to allow DEVONthink to control the Finder no longer self-dismiss.

⤴ The `compare` AppleScript command only returns a maximum of 40 results, consistent with the *See Also & Classify* inspector.

- ↗ You can control how long the `download URL` and `download markup/JSON from` AppleScript commands run by using a `with timeout of x seconds… end timeout` block.
- ↗ Improved overall database performance.

- ↗ **Sync —** Bonjour passwords stored in Keychain Access use the host's ID as the host name of a device can sometimes change when switching networks.

- ✓ Ordered lists in Markdown didn't render properly if there was no space after the dot. Fixed.
- ✓ Inline [MathJax](#) equations didn't always render properly in Asian language documents. Fixed.
- ✓ Edits to formatted notes could break the base URL causing resources like images to fail to load. Fixed.
- ✓ Web pages using the [Consent](#) framework crashed WebKit. Fixed.
- ✓ Converting emails (Pro and Server editions) and rich text documents to PDF documents could stall the app. Fixed.
- ✓ Searching for tags in a toolbar search or via smart groups and rules didn't work correctly with groups excluded from tagging and grouped RSS feeds. Fixed.
- ✓ Inactive tagging fields could freeze the app on rare occasion. Fixed.
- ✓ For favorited groups, the item count wasn't shown and their unread count didn't match what was reported in the item list. Fixed.
- ✓ The internal versions group wasn't properly filtered when determining statistics in *[Database Properties](#)* nor was it ignored in toolbar searches. Fixed.
- ✓ Switching between light and dark modes could cause visual artifacts in labels, ratings, and the *[Activity pane](#)*. Fixed.
- ✓ The background color of selected or hovered tabs in the tabs bar didn't display correctly in light mode. Fixed.
- ✓ Destination popups, e.g., in the *[Sorter](#)*, didn't display correctly in dark mode if the destination was the root of the Global Inbox or database. Fixed.
- ✓ The alignment of labels in the *License* dialog was off. Fixed.
- ✓ The Sorter didn't always appear in the menubar on macOS Tahoe. Fixed.
- ✓ Pressing ⌃↩ on modern versions of macOS didn't work properly in *Icon* view and could also change text selections. Fixed.
- ✓ Pressing the ⎋ *Escape* key with the database authentication panel open caused an issue. Fixed.
- ✓ The `Apply Rule` smart action didn't work properly if the applied rule ran asynchronous actions. Fixed.

- ✓ **Pro —** In rare cases, while in *List* view with a specific custom metadata field shown, disabling that field on another device and synchronizing could crash the app. Fixed.
- ✓ **Pro —** Tags were not applied to a document when scanning to a binder. Fixed.
- ✓ **Pro —** Using *[Data > Move to Trash](#)* could have caused glitches if the icon view of the [scanner interface](#) was active. Fixed.

- ✓ **Pro** — Changing the type of custom metadata fields, e.g., from Boolean or a number to a string, then editing a smart rule which uses these fields, crashed the app. Fixed.

- ✓ **Sync** — On rare occasions, adding a Bonjour sync location or synchronizing via Bonjour could cause memory issues. Fixed.

VERSION 3.9.16

DEVONthink now detects empty pages when clipping PDF documents, ensuring more consistent and useful results. We have made the Safari and Sharing extensions more reliable in macOS Tahoe and improved the sync performance. The app now also automatically adjusts resource usage based on your machine's temperature and workload. And, of course, we've included additional fixes to improve stability and reliability.

- ↗ We improved the consistency of syntax colorizing for quotes in Markdown documents.
- ↗ When clipping web content or using the `download PDF document from` AppleScript command to create PDF documents, DEVONthink now detects empty black and white pages and either filters them out or aborts the clipping.
- ↗ We reduced resources used with versioning by 90% for compatibility with version 4, especially during toolbar searches and while updating smart groups and rules.
- ↗ DEVONthink now explicitly registers its extensions to ensure they're available in Safari and macOS' Share menu.
- ↗ We improved the handling of *menu scripts* execution.

- ↗ **Sync** — We improved the reliability of syncing the *Reading List* and custom metadata via Bonjour.
- ↗ **Sync** — DEVONthink now detects the battery and thermal state of the machine and throttles the CPU and I/O load when syncing, as needed.

- ✓ Thumbnailing many small documents could sometimes cause a crash. Fixed.
- ✓ Converting rich text documents or emails to paginated PDF documents intermittently froze on macOS Tahoe. Fixed.
- ✓ Invalid relative image and transclusion links in Markdown could break previewing or converting the document or crash the application. Fixed.
- ✓ Links entered in lists in Markdown documents didn't work properly in WYSIWYG mode. Fixed.
- ✓ Markdown headings containing code weren't colored correctly. Fixed.
- ✓ Searches with proximity operators didn't always highlight the search hits in PDF documents. Fixed.
- ✓ In macOS' dark mode, text entered in new HTML documents was not inverted to white. Fixed.
- ✓ The *Tools > Summarize Annotations* and `summarize highlights of records` commands could sometimes return highlights in the wrong order, e.g., those made by PSPDFKit. Fixed.

- ✅ Web clipping via the Sorter when opened with the hotkey would include Safari's profile name. Fixed.

- ✅ Images dropped or pasted into Markdown documents with the *Files > Markdown > Import images to group* setting enabled didn't honor the *Files > Import > Recognition* or *Files > Import > Tags* settings. Fixed.

- ✅ Documents moved or duplicated between databases could incorrectly have the extension added to the internal name if *General > Appearance > Show filename extensions* was enabled. Fixed.

- ✅ Documents could be renamed with an empty name if *General > Appearance > Show filename extensions* was enabled. Fixed.

- ✅ Duplicate notifications from the *Extras* sidebar could occur when multiple main windows were open. Fixed.

- ✅ The internal name of files created via AppleScript incorrectly retained the extension. Fixed.

- ✅ **Pro** — The popup menu *Reveal* command of item link dropdowns in the *Data* inspector or form view of sheets always opened a new window. Fixed.

- ✅ **Pro** — In the German localization, the *OCR > PDF Resolution* setting couldn't be changed. Fixed.

- ✅ **Sync** — Bonjour synchronization could sometimes cause memory issues. Fixed.

VERSION 3.9.15

In Markdown documents, DEVONthink 3.9.15 detects links much faster and renders lists more reliably. Links to Apple Notes in a document now work, indexed Google Drive documents launch like the Finder does, and the *Sorter*'s *Add* and *Preview* buttons now show their keyboard shortcuts. For automators, folder actions trigger smart rules using the *On Import* or *On OCR* events. And of course, we have, again, made DEVONthink faster and more reliable.

- ↗ Editing very long Markdown documents is much more performant. DEVONthink detects links in Markdown documents at least 25 times faster when syntax coloring and WYSIWYG is enabled.

- ↗ Prism.js renders Objective-C code marked with the alternate `objc` or `language-objc` as well as the default `language-objectivec`.

- ↗ DEVONthink indexes web-based documents and converts them to plain text better.

- ↗ In the *Sorter*'s *Video Note* tab, the camera and microphone menu is disabled if DEVONthink is disabled in macOS' *Privacy & Security > Camera* settings.

- ↗ The *Add* and *Preview* buttons of the *Sorter* now display their keyboard shortcuts when the *Command* key is pressed.

- ↗ DEVONthink's built-in folder action scripts now run smart rules using the `perform smart rule` AppleScript command with the `On Import` and `On OCR` event triggers, as appropriate.

- ⚡ **Pro** — If you choose `Database` in the *To* dropdown of the scanner interface, a dedicated *Group* dropdown lets you choose the group to scan to. The settings are saved and also restored when connecting to a scanner.

- ✓ Thumbnailing Markdown documents could cause a rare crash. Fixed.
- ✓ Markdown lists didn't render properly when indented with one space. Fixed.
- ✓ The `Scan Text` smart action didn't ignore Markdown metadata if there was no other content in the document. Fixed.
- ✓ For RSS and Atom feeds with multiple authors, only the first was used. Fixed.
- ✓ In the item list in List view, the *Tags* column didn't display autocompletion results. Fixed.
- ✓ The tooltip shown when hovering over items with truncated names didn't fully display the name if the item also had property icons. Fixed.
- ✓ An open Quick Look panel didn't update when changing the selection of the view/edit pane when the hidden preference `DisplayGroupsInPreviewPane` was enabled. Fixed.
- ✓ The *First*, *Previous*, *Next*, and *Last* commands in the *Go* menu couldn't be used in toolbar search results. Fixed.
- ✓ In a multi-monitor setup with vertically positioned screens, the *Sorter* was only partially visible as a docked tab. Fixed.
- ✓ Links using Apple Notes' URL scheme couldn't be clicked in documents. Fixed.
- ✓ Indexed Google Drive documents couldn't be opened via the *Data > Open With* command. Fixed.
- ✓ `.strings` files weren't indexed correctly. Fixed.
- ✓ If the DEVONthink helper background task crashed, other background tasks, e.g., running scripts, could be blocked for a period of time. Fixed.

- ✓ **Pro** — In the popup menu of URL fields in the *Info > Custom* inspector and the form view of sheets, the *Paste* and *Remove* commands neither saved changes nor updated the layout. Fixed.
- ✓ **Pro** — Search queries using date-based custom metadata weren't always parsed correctly. Fixed.

- ✓ **Server** — The icons in the *Server > Users* settings didn't display correctly in macOS' dark mode. Fixed.

VERSION 3.9.14

This release includes several improvements and fixes. We've enhanced support for relative links in Markdown documents, allowing for spaces within the links. We also addressed an issue with list indentation. Previously, the *Favorites* section, e.g., within the *Move To* context menu, onlly displayed the first favorited item. We've resolved this, ensuring all favorited items are shown.

Furthermore, we've improved document language detection. Finally, it wasn't possible to navigate EPUB documents in the web interface via the table of contents, and DEVONthink unintentionally renamed images and PDF documents dragged via Universal Control.

- Image links in Markdown documents support relative URLs containing spaces instead of requiring percent-escaping.
- DEVONthink better detects the language of documents, whether you import, index, or create them within the application.

- Line items in Markdown lists indented with 4 or more spaces didn't render correctly. Fixed.
- Images and PDF documents dragged from the Finder into DEVONthink between two Macs connected via Universal Control would be renamed on import. Fixed.
- After inserting or deleting pages in a PDF document, the title of main and document windows and the subtitle of document windows didn't reflect the changed page count. Fixed.
- Copying section links in EPUB documents via the *Table of Contents* inspector didn't include anchors. Fixed.
- The *Favorites* section in the *Move To*, *Duplicate To*, and *Replicate To* context menus and *Destination* popups, e.g., in the *Sorter*, only displayed the first favorited group. Fixed.

- **Sync** — Databases with names containing, e.g., "GoogleDrive", "Google Drive", or "OneDrive" couldn't be created or imported from sync locations. Fixed.

- **Server** — In the web interface, EPUB documents couldn't be navigated via the table of contents. Fixed.

VERSION 3.9.13

This maintenance release fixes two regressions of the previous version and also improves a few things. Underlines and strikethrough PDF annotations retain the last color used, and importing encrypted databases via sync suggests the anticipated size. In addition, version 3.9.12 displays some package-based documents better in DEVONthink Server's web interface and handles filesystem events more reliably.

- Setting the color of underline and strike-through PDF annotations in the *Annotations* panel makes it the default color for those annotation types.
- Using the *Undo* command after classifying items works better in cases where annotation files have also been automatically moved.
- Better support for package-based documents with embedded HTML or PDF based previews.
- Revised appearance of tab preview popovers, shown when hovering on document tabs, for macOS 15 Sequoia and later.
- Dates specified in the Advanced search editor are converted to the toolbar search string using always the format `YYYY-MM-DD HH:MM:SS` to avoid time zone issues.

- Thumbnailing of videos uses now artwork if available.
- The *Recent Databases* section in the *Navigate* sidebar is more efficiently handled when you have multiple main windows open.
- Better handling of filesystem events.

- **Server** — The web interface better displays package-based documents with an embedded HTML or PDF preview.

- **Sync** — The approximate size of an encrypted database is now included in the sync data and used as the default size when importing the database on another Mac.

- When using macOS' dark mode, converting a Markdown or web-based document to a one page PDF displayed white text on a dark background in the converted document. Fixed.
- The *Move*, *Duplicate to*, and *Replicate to* context submenus didn't include *Favorites* or *Recent Destinations* section headers. Fixed.
- Revealing nested tags could fail when the *General > Interface > Unified Tags* setting was enabled. Fixed.
- When the *Sorter* was opened via a hotkey as a docked tab, it didn't respond to key commands. Fixed.
- Creating an annotation in the *Info > Annotations & Reminders > Annotations* inspector could crash the application on rare occasion. Fixed.
- Token fields in smart rules and batch processing could appear truncated. Fixed.
- The color of the *Multimedia* filter menu icon was incorrect. Fixed.
- The *See Also & Classify* inspector didn't show groups anymore. Regression. Fixed.
- The registration panel did not show the success or failure alert immediately after the trial period expired. Fixed.
- Indexed groups were not automatically updated in newly created databases unless you closed and opened the database or quit and relaunched the application. Fixed.
- Migrating and opening a database on a different Mac could stall the application for a while while checking filesystem events. Fixed.

- **Pro** — The `OCR > Apply` action in smart rules stopped working due to a regression in 3.9.11. Fixed.
- **Pro** — Emails and mailboxes could no longer be imported or archived in the *View > Import > Emails* sidebar due to a regression in version 3.9.11. Fixed.
- **Pro** — When printing or converting the form view of sheets to paginated PDF, rich text fields had a black background when using macOS' dark mode. Fixed.

VERSION 3.9.11

With this release, Markdown editing gets a little more polish with improved indentation on lists and controlling list view columns and sort options is easier with the *Customize Metadata* panel in the root of the *View* menu. In addition, DEVONthink sends us some anonymized data that can help us determine, e.g., if some features or actions are more popular than others. Of course, you can switch this off in the app's settings. We fixed several issues, too, as we continue to improve performance and reliability.

➕ Added *Usage: Send anonymized analytics data* to the *General > General* settings. See our company's Privacy page for more information on the data that may be sent.

↗ Characters are more reliably escaped when converting plain or rich text or pasting rich text to Markdown.

↗ In Markdown lists, items spanning multiple lines are consistently indented when *Files > Markdown > WYSIWYG editing* is enabled.

↗ Markdown rendering is more compatible with responses from version 4's chat assistant.

↗ In the item list, the *Word Count* and *Character Count* columns display more consistently.

↗ You can now find the *Customize Metadata* command on the top level of the *View* menu. Additionally, we've slightly improved the appearance of this panel.

↗ The *File > Export > Metadata (JSON)* command includes the location of items.

↗ The *Add linked images to DEVONthink* scripts for DEVONagent, Google Chrome, and Safari load images more efficiently and much faster.

↗ Improved overall reliability.

✔ When using DEVONthink's *View > Full Screen > Document* mode, selecting text with a mix of underline and strike-through styles could cause a crash. Fixed.

✔ Unlocked groups and feeds with a mixture of flagged and unflagged items didn't show an icon showing the mixed state. Fixed.

✔ When DEVONthink was offline, URLs in HTML, web archives, and Markdown previews didn't load linked items, e.g., stylesheets, that were already saved to the database. Fixed.

✔ After zooming in or out while editing text, lines didn't always wrap even though *Format > Wrap Lines* was enabled. Fixed.

✔ The *Copy* command for the color well in the *Info > Generic* inspector didn't work. Fixed.

✔ Once enabled, *Exclude from Wiki Linking* in the *Info > Generic* inspector and popover couldn't be disabled. Fixed.

✔ Tags on groups exported via *File > Export > Files & Folders* weren't retained when reimporting the groups. Fixed.

✔ When using aliases in WikiLinks, an incorrect number of WikiLinks or mentions could be reported for the `incoming Wiki references` AppleScript property or in the *Document > Links* or *Document > Mentions* inspectors. Fixed.

✅ **Pro —** Duplicated *Imprinter* configurations incorrectly retained shared font information. Fixed.

✅ **Server —** After starting the web server, not all the permissions columns were shown as uneditable and not all requests were logged. Fixed.

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- David Dauer. Refinement, cleaner reimplementation, documentation, IB Palette.
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SPARKLE

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ZIPZAP

TECHNOLOGY

All commercial DEVONtechnologies applications are based on a proprietary AI technology, with rock-solid database foundation that allow them to manage large numbers of documents or knowledge bits while analyzing them almost instantly at the same time.

GENERAL CONCEPT

DEVONtechnology, on which all DEVONtechnologies' applications are built, is a new technology at the very beginning of its development. DEVONtechnologies constantly improves the technology and enhances it for more functionality, efficiency, robustness and flexibility.

Development of the DEVONtechnology is a battle on two main forefronts of information processing technology. DEVONtechnologies is working hard on unifying both the top-down and the bottom-up AI concepts by imitating high-level functions and simulating the basic functionality of natural systems. This leads to highly functional, fast and efficient AI systems that can be used in a great variety of information processing contexts, such as pattern recognition, signal processing and information storage and retrieval.

FEATURES

The DEVONtechnology is a rock-solid foundation suitable for a variety of completely independent applications. Therefore it is ideal for the rapid development of a huge range of new database-, signal-processing- and language-analysis-driven applications. The ability to deal with any kind of digital data makes it extremely flexible.

The size of DEVONtechnology-based databases can, depending on the type of data stored, grow logarithmically and make indexing is completely unnecessary. Also, applications based on the DEVONtechnology improve themselves continuously (the more data they handle, the better the results), are language-independent and iron out any irregularities by applying fuzzy logic.

STRUCTURE

The DEVONtechnology consists of a kernel and several layers. Together they perform all the underlying computing, from 'simple' data handling to complex signal processing.

Kernel: The kernel is the foundation for all layers and applications and is responsible for data handling, semantic and associative data processing, signal processing, fast statistic analyses and all fuzzy algorithms. It has to be as fast, flexible, and extensible as possible; it is 64-bit aware and uses a generic, proprietary file format (see above)

allowing it to verify and repair low level data consistency, featuring logarithmic growth of the database and logarithmic speed decrease with increasing database size. The DEVONtechnology kernel is Unicode-aware, completely language-independent and self-optimizing and self-organizing.

Layers: The layers form a shell around the kernel and provide high-level functions for the applications built on top of them. The database layer, for example, is used to store and organize data and supports all kinds of relations (1:n, n:1, n:n), hierarchies and freeform databases. No indexing or primary keys are required, strings can be unlimited in size and it's possible at any time to extend the range of pre-defined data types (Boolean, character, float, double, signed, unsigned, string, date, time, blob, color, size, and point). Another layer, the XML layer, makes it easy to handle XML code within the DEVONtechnology; it has a very small overhead, compared to DOM parsers or available XML databases, requires no indexing and supports the tight integration of other databases (and vice versa).

APPLICATIONS

Some of the most likely applications for the DEVONtechnology are databases (knowledge bases, expert systems, search engines, table-of-content-generators, instant data-mining), intelligent agents, encryption, compression and archiving. Other uses for DEVONtechnology may be chat-bots, context-sensitive help, optical character recognition (OCR), speech analysis, recognition and synthesis, staticstics, thesauri and automatic translations.

In particular, applications dependant on processing human language, either written or spoken, benefit from the flexible technology foundation. So, DEVONtechnologies' main focus in the development of new applications is in these areas: databases, 'intelligent' agents, text and speech analysis, statistics.

Look forward to see a great range of different applications based on the DEVONtechnology. A few have already been announced on the DEVONtechnologies web site: www.devontechnologies.com.

OTHER PRODUCTS

Besides DEVONthink, DEVONtechnologies publishes a number of other commercial, shareware, and freeware applications and services that might be helpful for you.

OVERVIEW

DEVONtechnologies is focused on developing innovative applications for finding, storing, and organizing information. Our main objective is to make complex yet flexible technology that is both easy to use and lightning fast. All applications are based on the DEVONtechnology, a powerful and solid core unique to DEVONtechnologies.

- DEVONthink
- DEVONthink To Go
- DEVONagent
- DEVONsphere

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